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ABSTRACT

The present and future training needs of financial aid practitioners (financial aid officers, counselors, and support staff personnel) at Arizona colleges and government agencies were assessed. Attention was directed to the literature on training and programs for financial aid practitioners, as well as the possibilities of developing a coordination model for training in the state. A survey was conducted of 153 representatives of government agencies and postsecondary institutions, including 58 administrators, 33 counselors, 43 office staff, and 19 fiscal officers. For these four respondent groups, comparisons were made on demographic and institutional factors and on 19 financial aid concerns. An index for each respondent group was developed to summarize respondents' views of how well prior training programs had met their needs for information. This index was intended primarily for evaluation, while a second index, intended to assess future training needs, was also developed. It was found that the level of need for further training programs was sharply different among the four respondent groups. In addition, the need levels were different for many functional areas within each group. Training needs surveys for each of the four respondent groups are included, along with statistical findings of the study and a literature review. (SW)

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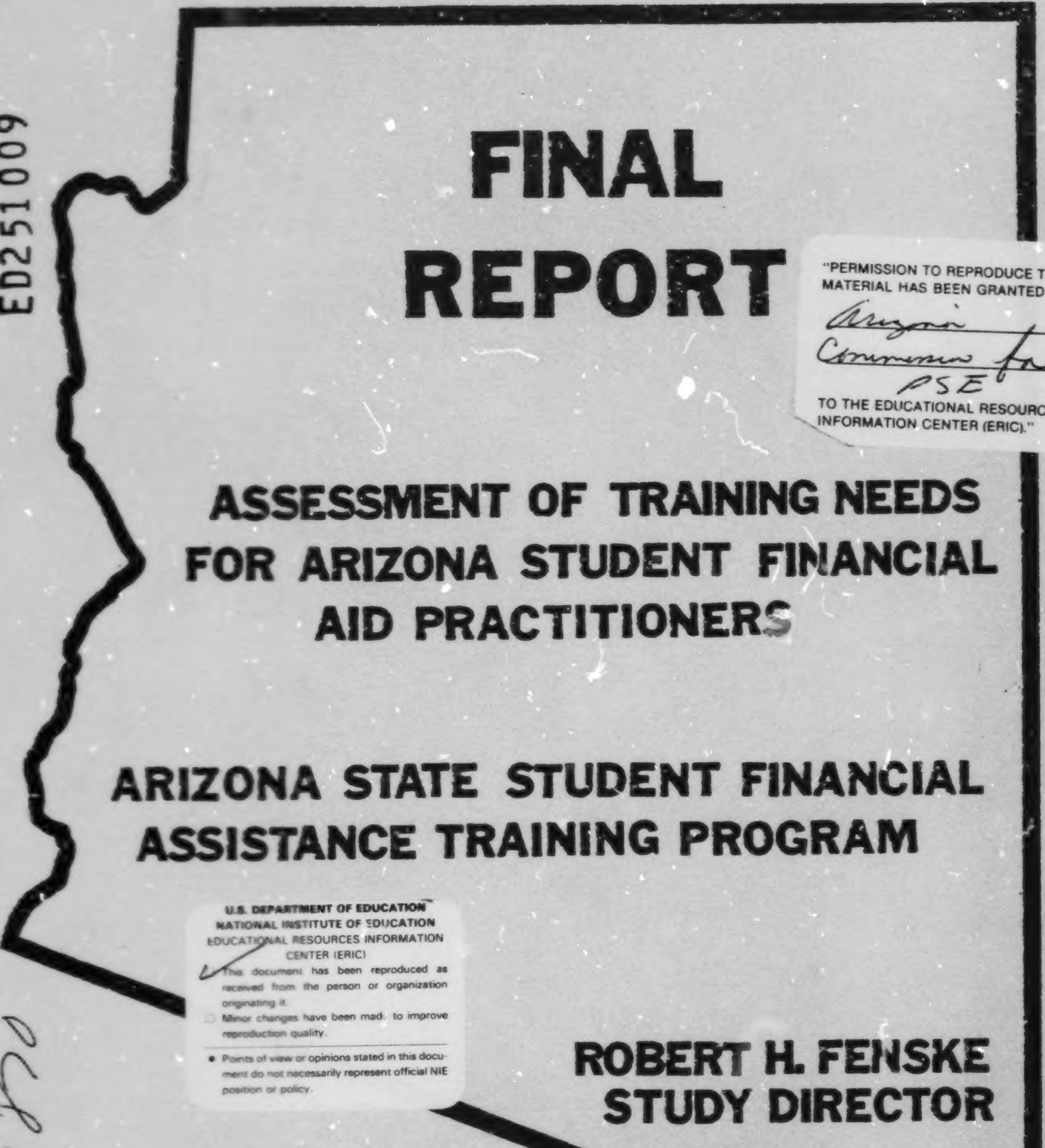

FINAL REPORT

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ASSESSMENT OF TRAINING NEEDS FOR ARIZONA STUDENT FINANCIAL AID PRACTITIONERS

ARIZONA STATE STUDENT FINANCIAL ASSISTANCE TRAINING PROGRAM

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STUDY DIRECTOR

HE 017 830

ARIZONA COMMISSION FOR POSTSECONDARY EDUCATION

FINAL REPORT

ASSESSMENT OF TRAINING NEEDS FOR ARIZONA STUDENT FINANCIAL AID PRACTITIONERS

Robert H. Fenske
Study Director

This study was sponsored by the Arizona Commission for Postsecondary Education under the Arizona State Student Financial Assistance Program as authorized under Section 2193 C of Part F of Title IV of the Higher Education Act of 1965, as amended.

The Study Director wishes to acknowledge the invaluable assistance of members of the study's liaison committee including Armando Alba (Regional Director, the American College Testing Program), John Coles (former Director of Financial Aid, Yavapai College), Frances Lunn (Student Loan Clerk, Mesa Community College), Dennis Hegle (Past President, AASFAA and Director of Student Financial Aid, Scottsdale Community College), J. J. Humphrey (Director of Financial Aids, University of Arizona), William LeRoy (Director of Financial Aids, Biosystems Institute), Vincent Roig (Training Coordiantor, AASFAA, and Coordinator of Student Employment, Arizona State University) and Christine Wilkinson (Director of Admissions, Arizona State University). Robert Bowman of the Commission staff and Pat Clark, 1979-80 Training Coordinator for AASFAA, were most helpful in addition to Dr. E. James Maxey and Dr. Don Carstenson of the headquarters staff of the American College Testing Program.

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BACKGROUND OF THE STUDY

The training of student financial aid practitioners has recently emerged as a problem of considerable magnitude because of the concurrence of several factors (1) the burgeoning growth of student aid in all dimensions including money appropriated and awarded, number of programs, number of student applicants and the resulting rapid increase in practitioners (2) the complexity of the need analysis and award systems, and (3) inadequacies in the professional preparation of aid officers and training of support staff. The last factor is evidenced in an almost total lack of focused preservice academic programs, uncoordinated inservice education and a lack of professional recognition reflected in low salaries and status relative to the heavy responsibilities now burdening aid practitioners.

As discussed in the following section which reviews the pertinent literature, there was sporadic interest in pre- and inservice programs throughout the 60's and early 70's, however, it was not until recent years that massive efforts were initiated to deal with the challenge. These efforts include a consortium comprising the American Personnel and Guidance Association (APGA), National Association of College and University Business Officers

(NACUBO) and the National Association of Student Financial Aid Administrators (NASFAA) which offers inservice programs funded by the U. S. Office of Education and offered in conjunction with regional and state associations of aid administrators. Both the American College Testing (ACT) Program and the College Scholarship Service (CSS) have intensified their activities in providing workshops and distributing training materials. Also, the federal government has funded training programs through the 1972 Amendments to the Higher Education Act of 1965.

Beginning with Fiscal year 1977 the State Student Financial Assistance Training Program (SSFATP) provided federal funds to the state agency which administers the State Student Incentive Grant (SSIG) program. The Arizona Commission on Postsecondary Education (ACPE) administers the federal funds allocated to Arizona under Section 2193 C of Part F of Title IV of the Higher Education Act of 1965, as amended in 1972. These modest funds are intended to "increase the efficiency of financial aid administrators". Subsequent regulations have expanded the definition of "administors" to include such support and ancillary staff as counselors, fiscal officers and office staff. Pursuant to the regulations, the Arizona Commission on Postsecondary Education worked closely with the state Association of Student Financial Aid Administrators (AASFAA) in sponsoring needed training programs in the first two fiscal years of the program. In accordance with final regulations and with encouragement from the federal program administrator, it was decided that the most effective activity during the third year of the program would comprise an evaluation phase to review the first two years training activities and to guide future developments of the program.

Under the first year of funding in 1977-78, the Commission in cooperation with AASFAA, conducted the first coordinated statewide training effort in Arizona. During that year, the Commission presented two highly successful training programs. The first was a comprehensive three-day workshop covering the topics listed in Section 178 a.5 of the SSFAT program regulations. The second training program was a one-day workshop for support staff personnel from the institutional aid offices. The two training programs attracted 118 and 80 student financial aid practitioners, respectively.

Training activities under the SSFAT program during the second fiscal year (1978-79) comprised (1) a successful two-day workshop designed specifically for new financial aid officers, and (2) a one-day symposium on the future trends in student financial assistance. The workshop attracted 52 participants and the symposium was attended by over 100 financial officers and others interested in student financial aid. The program activities of these two fiscal years have been fully reported and are on file in the Commission offices.

Evaluation of the training activities conducted during the first two years of the SSFAT program indicated that they were valuable and important in meeting the training needs of the financial aid community as identified by the Commission and AASFAA. Even though the evaluations conducted on the program activities indicated a high degree of success, several factors indicated that a different type of activity was called for during the third year's activity:
(1) the four programs offered during the first two years were aimed at the major segments of the financial aid community. Further program offerings would possibly duplicate prior efforts.
(2) various other training activities not under sponsorship of the Commission nor funded by the SSFAT program were offered during the same two-year period. Overlap and duplication was a potential problem to be considered in planning further programs.
(3) the rapid growth in student enrollment and financial aid activities experienced by the more than 300 postsecondary educational institutions in Arizona appeared to be increasing at a much more moderate rate during the first two years of SSFATP activities. As conditions changed, training needs probably changed along with them, for example, the need

to hire and train new staff appeared to diminish at this time. (4) the definition of financial aid practitioner has expanded to include counselors, technicians, fiscal officers and support staff. (5) the role of the state in the area of student financial assistance has expanded since the advent of the SSIG and accompanying training programs.

Thus, a consolidation and evaluation research phrase seemed the most appropriate next step for the SSFAT program in Arizona. In consultation with AASFAA leaders, the Commission staff determined that the following broad range of possible goals would be appropriate for the evaluation study:

1. Assess the present and future training needs of, and staff requirements for, financial aid practitioners (financial aid officers, counselors, and support staff personnel) at governmental agencies and institutions of postsecondary education in Arizona;
2. Survey past and present training activities and programs for financial aid practitioners and assess their impact; and
3. Investigate the possibilities of developing and implementing a coordination model for financial aid training activities and programs in the state.

The Commission identified Dr. Robert H. Fenske, Arizona State

University, as a qualified principal investigator for the study and directed him to work closely in the design stage with a liaison committee comprised of: Armando Alba (Regional Director, the American College Testing Program), John Coles (former Director of Financial Aid, Yavapai College), Frances Dunn, (Student Loan Clerk, Mesa Community College), Dennis Hegle (Past President, AASFAA and Director of Student Financial Aid, Scottsdale Community College), J. J. Humphrey (Director of Financial Aids, University of Arizona), William LeRoy (Director of Financial Aids, Biosystems Institute), Vincent Roig (Training Coordinator, AASFAA, and Coordinator of Student Employment, Arizona State University) and Christine Wilkinson (Director of Admissions, Arizona State University).

The resources available for the study indicated that it would be feasible to aim for all of the goals stated above. However, an assessment of future staffing requirements was not included in the research design. It was felt that these projections were so heavily dependent on funding of the programs at both the federal and state levels that data collected before Congressional reauthorization decisions in 1980 would be highly speculative and probably inaccurate.

The liaison committee provided invaluable assistance to the principal investigator in several important dimensions. The committee members represented virtually all important sectors of the financial aid community, and willingly provided advice and information from their various perspectives. Their involvement elicited confidence in the project from the aid community and enhanced its support. They helped establish the initial research design and provided valuable advice on procedures.

The following sections of this report reflect the contributions of the liaison committee and the assistance of the American College Testing program regional and national staff. The following sections describe, in order, the review of literature undertaken for the study, the procedures utilized to gather and analyze the data, the findings resulting from the analysis, and the conclusions and recommendations produced by the study.

REVIEW OF LITERATURE

A search for relevant literature was conducted within the following framework: First, material was located that dealt with the role of the student financial aid professional and the need for training, both pre-service and in-service. Second, reports of other state surveys of training needs were studied. Finally, the materials for in-service training that other states had developed on the basis of their survey research were examined.

Activities

(1) The liaison committee described in the preceding section was asked to provide information about materials pertinent to the study. In addition, meetings were held with individual committee members and with the staff of the Commission to obtain and discuss materials.

(2) The Arizona Educational Information System was commissioned to conduct an ERIC search for research reports, training modules and other materials of other possible interest. A national repository of research materials was accessed through this system. The search produced a number of documents which were obtained directly, a computer print-out which comprised a detailed annotated bibliography and a

number of micro-filmed reports.

(3) A direct library search was made at the Hayden Library of Arizona State University. In addition, the Student Financial Aid Office at Arizona State University was asked to provide relevant materials. Both sources yielded useful materials.

(4) Both ACT and CSS were contacted with a request for materials. ACT responded with a number of research reports, workshops evaluations, questionnaires used in other studies, research reports and other useful materials.

(5) Both the Arizona Association of Student Financial Aid Administrators and the National Association of Student Financial Aid Administrators were contacted for sample training program materials and other publications of use to the study. The immediate past president of AASFAA, Mr. Dennis Hegle, responded with copies of training materials and also a full set of AASFAA Newsletters, which chronicled training activities in recent years. Mr. Dallas Martin, Executive Director of NASFAA, responded with a full set of training materials and other information.

(6) The Communications Network of the State Higher Education Executive Officers and the National Center for Educational Statistics were accessed; the document inventory provided by the Network of over

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1,300 listings was inspected and appropriate documents were requested and obtained.

(7) Finally, all state agencies which were members of the National Association of State Scholarship and Grant Programs (NASSGP) were sent a letter of request for survey reports, training materials and other information. An identical letter was sent to all state "1202 Commissions" in those states where such state agencies were separate from NASSGP members. A copy of the letter is shown as Appendix A. The state agencies were most generous in their assistance to this study.

Role and Status of the Profession/Need for Training

The general impression one is left with after a thorough review of the relevant research literature is that the preparation (both pre-service and in-service training) of student financial aid professionals through the present uncoordinated training activities is probably not adequate to develop and maintain competence in administrators. Another observation is that the status of the profession is not commensurate with its heavy responsibilities. The prestigious Carnegie Council on Policy Studies in Higher Education evidently agrees with this overview. In a final report on recommendations for federal student aid programs released just as the present study was initiated, the Council recommended that "the Office of Education should also encourage adequate training and upgrading of student-aid officers." (Chronicle of Higher Education, 1979).

There are no consensual professional standards such as those which exist in some education fields like counseling or teaching. This applies to academic preparation as measured by attainment of degrees, and type of education as indicated by disciplines studied. Neither are there competency-based measures like those reflected in state board examinations in professions like nursing or law. The reason seems to be that student financial aid has its roots in the institutional role. That is, the profession was developed not as part of a regional or national movement, but was evolved from an essentially clerical role within each institution. Therefore, it was idiosyncratic to the specific traditions, resources and needs of each college or university. The student financial aid practitioner needed only (and above all) to know the procedures and practices at the institution. There was no need for inter-institutional standardization of such practices and procedures. However, the advent of a standard needs analysis service introduced by CSS and later by ACT resulted in the practicioner referring to an external standardized procedure. State scholarship agencies and the programs funded by the federal government then overlaid the entire system with massive sets of regulations for detailed procedures to be executed on rigid and overlapping schedules. Thus, there is now what amounts to a common body of knowledge and practice imposed on student aid professionals from external sources, but no standard way to prepare professionals for these responsibilities or to measure apriori their capability to carry out these duties.

A fair and appropriate analogy is the situation in certain other student service roles such as the registrar, and the admissions, placement, and institutional advancement officers within institutions. Internships and on-the-job training is the mode in all of these professional roles as well as student financial aid. Whether student financial aid will move from this basis is an interesting question. The fact that some other education professions have moved to certification standards and expectations is no clear and necessary indication that a similar metamorphasis will occur in student financial aid.

Adams (1975) adopts a role model approach in studying the administrative function in offices of student financial aid. He indicates that it is the chief administrators responsibility to establish the unit's philosophy, goals and methods. He maintains that this process is especially necessary for evaluation and accountability purposes. The chief administrator is also responsible for staff employment, training, retention and organization. These responsibilities extend to all levels of employed personnel including mid-management, professional counselors, office staff and any part time personnel that might be employed. Finally, Adams describes the principal functions overseen by the chief administrator. These are the counseling and clerical functions, the business function (which includes not only management of student aid funds but management of the office budget as well), the supervisory and teaching functions, and the administrative function. He might also have added that each chief executive has a "political" function in which the entire office will prosper or suffer according to the skill with which he is able to maintain good relationships with other student services offices and the success that he has in obtaining needed resources and staff for student financial aid.

Harris (1968) suggests an interesting perspective that the financial aid administrator and counselor should have toward their student clientele. He maintains that student aid applicants are typically self-selected for a high order of needs in academic, personal, and financial counseling. For example, "recognizing that many of his clients lack competence in managing money, the student aid officer has an excellent opportunity to function as an educator. To meet this need, he could include in the operation of his office a supervised practicum in personal budgeting " (p. 25). He maintains that such personalized services are necessary because an increasing proportion of disadvantaged students will be on the campus and in the financial aid office, and that college is an induction into the middle class for these students who do not come with ready-made values and skills in coping with college. Harris uses a familiar image to make his point: "The financial aid officer who is unaware of or ignores the special adjustment problems that college life causes his clients from poverty backgrounds--who becomes too involved in his administrative duties to also be their personal 'resourceful uncle'--is, in all probability, going to lose more of these clients than he should" (p. 26).

Keene (1975) agrees with Adams when he states that "...a financial aid operation can truly be no better than its staff" (p. 223). Keene maintains that the key to achieving full use of this critical element is effective evaluation of staff. He makes an interesting point when he emphasizes that the evaluator should recognize that there are both measurable and non-measurable outputs by which to judge the effectiveness of personnel, and that it is important to recognize and differentiate between the two. Perhaps the most effective way is to evaluate the effectiveness of the programs for which staff are responsible. Such an approach will include both the quantifiable and non-quantifiable outcomes of the staff member's activities.

The role of the financial aid officer exhibits considerable variation according to type of institution and the particular history of the function within each institution. North (1975) examined the role of aid officers in terms of organizational structure. He maintains that aid programs bring so much money into the institution that they demand the highest quality administrator obtainable. According to North, "...the institutional aid officer should be responsible to the president or the chief executive officer of the institution. The personnel appointed to perform the task should have the personal qualifications and career aspirations and potential necessary to make such an appointment practical" (p. 264). North then details the specific relationship the aid officer should have with the chief business and academic officers, the dean of students, the admissions officer, and the alumni and development officer. In general, he advocates a very strong functional relationship of equality or near-equality with these administrators. The basis for his assertion is that financial "...aid is not the only position which cuts across many segments and operations of the institution, but it is one which cuts across more than most and affects all in a most significant manner. It is, therefore, too important to be a lowly and unintegrated position in the administration organization" (p. 274).

In contrast to the somewhat exalted status recommended by North, Haines (1976) has a different and possibly more realistic view. "On most campuses, the Directors of Admissions and Student Financial Aid have not been included in the traditional planning process. One reason may be that planning has never been viewed as a high priority activity requiring broad input. A second and perhaps more valid reason is that these positions are generally considered to be at the second or third level in the management structure. This attitude is certainly supported by a review of organizational charts, and by the salaries paid to these two officials" (p. 3). Haines deplores the relatively low status and urges that it be improved. The basis for his concern is as follows: "Now think for a moment about the amount of the annual operating budget (revenue and expenses) that is either a direct or indirect responsibility of admissions and financial aid." He indicates that most private institutions depend on student fees "...for at least 75-80 percent of their current revenue. How may a college expect to enroll and retain an adequate number of students without involving the two officers that have the primary responsibility in these areas? There is no rationale for continuing the practice of hiding these positions in the administrative structure" (p. 3). Perhaps one reason is that typically the aid officer has not had academic qualifications and preparation that is commensurate with either the newly enlarged responsibility or with the executive management level within the institution.

King (1975) reviewed the lack of standardized academic preparation of practicioners in the student aid field. He points out that "This situation may change, of course, as the professional organizations for financial aid personnel begin to make people in general more aware of the profession and its possibilities and as graduate schools respond with programs and course offerings. Meanwhile, however, the situation favors the development of in-service programs of preparation and improvement" (p. 295). The author recommends that graduate programs be developed in a number of strong institutions located strategically around the country. Applicants to the program could have had their baccalaureate-level training in a number of desired competencies such as guidance, administration, sociology, psychology, computer science, accounting and other majors. The overall program (undergraduate plus graduate) should provide a very comprehensive and broad base of academic preparation. King concludes, however, that full acceptance of the idea of graduate programs as a requisite, or even as highly desirable, preparation for financial aid administration is sometime in the future. "Meanwhile, however, the situation favors the development of in-service programs of preparation and improvement" (p. 295).

A number of years ago NASFAA developed criteria for the certification of financial aid administrators. These were challenged broadly by persons in the field and by some scholars. For example, Moore (1975) indicates that criteria based on traditional qualifications like degrees would not be practical or useful for the near future. He suggested that certification, if it should be utilized generally, should be based on competency relating to the actual responsibilities of aid administrators. Internships seemed to be a widely acceptable method of developing entry-level practicioners. Morris (1972) describes such an internship program at California State College (Fullerton) and indicates that it has been highly successful.

Meanwhile, the entire issue of professionalization and professional development of financial aid officers continues to be a live and unsettled issue in the field (see, for example, Sanderson (1971) and Willingham (1970) for two differing views on the issue).

Finally, Davis and Van Dusen (1970) reviewed a large number of studies of the background characteristics of financial aid administrators. They concluded that

> "the literature demonstrates that aid administrators have varied, and frequently rich, backgrounds. Most hold master's degrees and many have doctorates. While they come from many different academic backgrounds, the majority have had training in business, the social and behavioral sciences, and in student personnel activities. The studies indicate that most aid administrators have held their present positions for a relatively short period of time (less than five years). As the demand for trained aid administrators increases, the average tenures are increasing. The majority of aid administrators are content with their jobs and many will use them as stepping-stones to higher administrative positions in postsecondary institutions" (page 86).

Other State Surveys

A number of states who replied to the project investigator's request for information had also conducted surveys of financial aid practitioners. Notable among these was Kentucky, which was among the first (1977-78) to conduct a comprehensive survey under the SSFAT program. The survey results were described in a full report. The Kentucky Higher Education Assistance Authority utilized the services of ACT in development of the conceptual model for the needs assessment which was conducted. The report (Commonwealth of Higher Education Assistance Authority, 1978) was extraordinarily complete, and provided a point of departure for development of the item pools used in the present study. The study populations in Kentucky included financial aid administrators, fiscal officers, high school and vocational school guidance counselors, students and satellite groups and agencies. In all, 774 questionnaires were sent to samples of the group. Slightly over fifty percent of those sampled returned useable questionnaires. The results enabled the state agency to develop training content in five areas: (1) Packaging techniques (2) Student budgets (3) Communications (4) Compliance, and (5) Management practices.

The Iowa College Aid Commission conducted a questionnaire survey in 1978 of all Iowa financial aid administrators, para-professionals, and support staff. The results strongly supported the development of training opportunities for support staff as well as identifying needed training opportunities for other practicioners.

A needs assessment survey was made of 240 financial aid administrators at postsecondary institutions in Tennessee during the 1977-78 academic year (Tennessee Student Assistance Corporation, 1978). The response rate of those sampled was seventy-eight percent and resulted in the following findings:

> Financial aid administrators in Tennessee exhibit the most critical need for training in the area of office management. Other areas of training need include student expense budgets, independent students and refund and repayment policy. The findings of this survey influenced the planning of the comprehensive workshop for financial administrators which was conducted in June,1978" (page 4).

The State of Alabama Commission on Higher Education adopted a slightly different approach in their survey of training needs in a fall, 1977 research effort. They conducted a "pre-test" of knowledge on student financial aid procedures and, after a one-day training session, tested the participants on a "post-test." They found that the participants increased their test scores by twenty-four percent (from thirty-nine percent average score on the pre-test to fifty-three average score on the post-test). They also conducted a questionnaire which revealed that about two-thirds of the participants strongly agreed that the training sessions were adequate, and that virtually all of the remainder moderately agreed that the training sessions were adequate.

The New Jersey State Student Financial Assistance Program began its activities in the fall of 1977 by surveying training needs and by assessing the strength and weaknesses of the training already being offered. A special questionnaire was developed for campus and state aid administrators. The results enabled the state agency (Department of Higher Education) to develop an outline of the outstanding training needs. These, in turn, formed the basis for workshops offered in subsequent years.

The West Virginia Board of Regents surveyed the state's aid administrators in 1977-78 in order to determine training needs. Workshops were then conducted to meet the needs and the results were evaluated. This process was repeated in subsequent years. The researchers found that certain areas (such as need analysis, student budgets, and independent student) continued to rank high in need for more training even though the areas were covered repeatedly in workshops. Evidently, the complexity of the aid program and constantly changing procedures necessitated the

the repetition of training programs.

The Board of Regents of the State of Louisiana called upon the resources of ACT to survey postsecondary undergraduate student financial aid. Although it was primarily a survey of students to determine the extent of their financial need, the researchers also found that "Louisiana postsecondary institutions appear to be in need of additional staff and resources in the area of financial aid administration" (page 86). They also recommended that increased training activities be utilized to help alleviate staff resource problems.

The State Student Financial Assistance Agency of the State Board of Higher Education in North Dakota conducted surveys in 1977 based on the Kentucky Training Project described above. The results of their survey served as the foundation for training programs in subsequent years.

Finally, brief descriptions of needs assessment surveys were provided by the Maryland State Scholarship Board, the State of Washington Council for Postsecondary Education and the Georgia State Scholarship Commission. However, final reports were not available or provided by these agencies.

Training Materials and Activities

Several states provided training documents, modules, and manuals used in their SSFAT program. Many of these were based on needs assessment uncovered during research surveys similar to the present study. The North Carolina State Education Assistance Authority and the North Carolina Association of Student Financial Aid Administrators (1978) developed and utilized an extensive instructional syllabus. The syllabus was modified and adapted to be used in three levels of instruction for aid administrators: novice, intermediate and advanced. State financial aid administrators in Texas and Virginia independently developed interesting models for training programs. These will be discussed in the final section of this report. In addition, Texas developed an extraordinarily detailed Handbook for Consultants and Trainers for use in SSFAT programs throughout the state (Texas College and University Coordinating Board 1977). This publication includes historical information and background materials, a description of legislative authority for the state financial aid programs, an overview of federal student aid, and detailed instructions for carrying out training activities.

The Iowa College Aid Commission (1979) developed a sophisticated Program Learning Manual on Financial Need Analysis utilizing the resources of both CSS and ACT. Essentially, the Manual is a self-contained device for providing both instruction and evaluation to be used by practicioners individually.

One of the most complete training manuals available for novices or beginners in the financial aid field is that developed by the California State Student Aid Commission (1979). It comprises five separate modules which deal with history and purpose of student aid, the application process and needs analysis, packaging and processing, verification and accountability, and professional development.

The most extensive single training manual developed by a state agency was that provided to the primary investigator of the present study by the Alabama Commission on Higher Education (1979). The manual comprises well over 200 pages of very complete information. It is intended for comprehensive and detailed training in no less than twelve separate areas:

(1) Projected trends and future of student financial aid
(2) Basic Educational Opportunity Grants
(3) National Direct Student Loan programs
(4) Maintenance of student records and disbursement systems
(5) Student and institutional rights and responsibilities
(6) College Work-Study programs

(7) State programs

(8) Student budgets

(9) Needs analysis and packaging

(10) Supplemental Educational Opportunity Grants

(11) Office Management

(12) Program reviews and audits.

Prior to the inception of the SSFAT program, the principal national activities were training programs sponsored by the U. S. Office of Education and provided through a consortium composed of APGA, NACUBO, and NASFAA. Generally, these were coordinated through the regional offices of the U. S. Office of Education. These training activities were extremely comprehensive during the three year period before 1977 and continue to play a significant role in financial aid in-service education.

Recently, NASFAA (1978) developed a highly sophisticated series of four fundamental training modules available for use in state SSFAT and other financial aid training workshops. The modules deal with management, professional development, evaluation and student relations. To insure that the training modules are used to the fullest extent, the Association selected regional lead trainers who comprise a network of resource persons to (1) coordinate NASFAA training with their respective regions (2) insure consistency of training and quality control (3) provide consultative services to trainers to clarify intended use of the material (4) assist in actual training if requested by the purchasers, and (5) provide feedback to the training committee on the use and effectiveness of the materials. In addition, the previous year NASFAA sponsored the development of A Handbook for Use in the Preparation of Student Expense Budgets (Clark, 1977). These materials comprised the primary resource for training programs sponsored by the national Association.

In summary there clearly is extensive activity in training programs engaged in by many state associations. Some states have developed comprehensive training materials on their own. Others apparently utilize NASFAA, U. S. Office of Education, or other material. In Arizona, there has been no lack of training activity. The Commission on Postsecondary Education has sponsored a number of workshops as noted in the preceding section. These have been in conjunction with ACT and with AASFAA. In addition, Region IX staff has conducted workshops for the U. S. Office of Education and a variety of other activities have taken place under the sponsorship of various commercial organizations. This level of activity indicated that the third phase of the SSFAT program in Arizona hardly needed to be the sponsorship of still more training programs. Rather, the need seemed apparent for a research survey of needs assessment. The following section describes the procedures and methodology used.

METHODS AND PROCEDURES

The research was developed and conducted by (a) consulting extensively with Arizona financial aid practitioners (largely but not exclusively with the Study's Liaison Committee), (b) locating and examining the research literature, especially research reports from other states which conducted similar surveys, (c) developing, in consultation with ACT Research staff at their national headquarters, an appropriate research design which would not only meet the study objectives but also conform to generally accepted research standards, (d) gathering data via a specially designed questionnaire, and (e) analyzing and disseminating the findings through a preliminary report, at an AASFAA meeting, and by the present final report.

Developing the Research Design

Preliminary meetings were held in February and March, 1979 with ACPE staff and with several experienced student financial aid administrators. After approval of the project by the Commission staff, the primary investigator met with the full liaison committee in mid-March, 1979, for an orientation meeting. Work was begun on the research design immediately after that meeting.

At the next full meeting of the liaison committee in late March, an extended discussion was made of research design needs. It was decided that (a) the questionnaire survey approach would be used, (b) data gathering would be accomplished in Spring, 1979 (even though the official funding cycle would not begin until July 1, 1979) with analysis to take place over the following Summer and Fall, with dissemination activities to begin in January and February, and (c) the survey would not be restricted to administrators, but would also inlclude support staff like counselors and office staff, as well as fiscal or business officers.

Considerable discussion centered on the research model used by the Kentucky Higher Education Assistance Authority in their 1978 SSFAT program training assessment. This was a leading example of a generalized approach that seems to have emerged from a number of previous efforts. Investigation of these efforts in other states revealed that their needs assessment model was based on one developed by ACT Research staff at their national headquarters. This model was called the River City model and is a self-assessment of personal needs. ACT regional staff had worked with the Kentucky researchers in modifying that model for use in their 1978 survey. Essentially, the approach of the Kentucky researchers was to develop a matrix of a large number of items representing student financial aid areas about which the respondents needed to have more knowledge (for example, "I need to know more about Basic Educational Opportunity Grants") cross-tabulated by responses designating several levels of "Need Felt" and "Need Met By Prior FA Training Programs." The "Need Felt" possible responses were "No Need, Weak, Moderate, and Strong." The "Need Met By Prior FA Training Programs" possible responses were " Met Well, Met Partially, Not Met At All." After considerable discussion with the Liaison Committee, ACT regional and national educational service representatives, and an on-site consultation with the ACT national headquarters, it was decided that the model could be further adapted or modified to be more effective for the present study. It was perceived that the Kentucky researchers had assumed unidimensionality of need, that is a need for training along a time dimension as being either past or present. The assumption for the present study was that there were essentially two dimensions to be assessed, (1) the extent to which prior training programs had met the respondents information need, and (2) the extent of need for future training programs. Accordingly, the following format was used in the present study for the data-gathering instrument applied to the financial aid practitioner groups of a) administrators, b) counselors, c) office staff, and d) fiscal officers.

	Prior Training Programs Met Information Need:			Present Need for More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
I need to know more about _____ financial aid program:							

The Liaison Committee agreed to survey selected members of their own staff to expand the item pool with items that were especially applicable to the Arizona situation. It was agreed that many, if not most of the questionnaire items would be drawn from the items used in the Kentucky, North Dakota, and other state surveys with which ACT had been involved. These items were in the public domain, nonetheless, we wish to express our gratitude to the ACT regional and national educational services staff and the research staff of the national headquarters for their willingness to allow use of the items and to have them adapted for the present study. Their assistance in research design and analysis activities was invaluable throughout the Study. We also wish to acknowledge the helpful exemplary role that the Kentucky, North Dakota and other states' surveys served for this study.

The 1978-79 President of AASFAA, Mr. Dennis Hegle, developed a general letter sent to all institutions to be surveyed in Arizona, alerting them to the study and urging them to cooperate. This letter is reproduced in this report as Appendix B.

Sample

It was decided that the unit to be studied would be individuals identified with all institutions which met certain eligibility criteria.

The principal reason was that an accurate listing was available of the institutions and their student financial aid activities, while a separate preliminary survey would be needed to determine the number of practitioners in the four categories of administrators, counselors, office staff, and fiscal officers.

The relatively small number of postsecondary institutions in Arizona indicated the feasibility of surveying all that met relevant criteria. Eligibility required (a) that the institution designate available financial aid programs and list a financial aid officer, (b) that it be accredited, and (c) that at least one of its programs be of at least six months duration. In addition, several agencies which include educational counselling as a major function (for example the Educational Opportunity Center) were included to bring to sixty-seven the total number of institutions included. The roster used was the 1979 Directory of Postsecondary Educational Institutions in Arizona, an annual publication of the Commission.

Administration

The Liaison Committee had advised the principal investigator that the best time for administration of the questionnaire would be in early May because most financial aid officers would be at the institutions because academic programs were still in session in nearly all institutions, however, the work load would not be at its peak at that time.

Separate questionnaires were developed for each of the categories. A total of nineteen items were common to all four practitioner groups to allow cross-comparisons. In addition, forty-five items were specific to administrators, twenty-five to counsellors and office staff and forty-one to fiscal officers. The needs assessment items were preceded by six basic data items common to all four groups, with an additional three items for administrators (see appendix C for facsimiles of all four questionnaires).

Every eligible institution listed in the 1979 Directory of Postsecondary Educational Institutions in Arizona was sent multiple copies of each of the four types of questionnaires. A cover letter with instructions and an appeal for cooperation was also sent with the questionnaires (See appendix D for a facsimile of this letter). The packet, which was mailed in early May, 1979, included a request for each principal financial aid administrator to distribute and collect the questionnaires among his or her staff. The packet also included a stamped self-addressed envelope for return of the questionnaires. Since the great majority of institutions are small, privately operated schools with one person in charge of all aspects of financial aid, this resulted in only a small percentage of the questionnaires that could be used by most of the institutions. The larger institutions were, of course, able to administer the optional questionnaires for counsellors, fiscal officers and office staff.

A total of 176 usuable questionnaires from 56 different institutions and agencies were received. These were then inspected to identify those which had answered all or virtually all of the six background items, as well as the 19 needs assessment items that were common to all four types of questionnaires in addition to providing responses to nearly all of the larger number of specific items. This stringent requirement reduced to 153 the number of respondents included for analysis. These comprised 58 administrators, 33 counselors, 43 office staff, and 19 fiscal officers.

Analysis

The questionnaires were then edited by the principal investigator and delivered to the ACT national headquarters for keypunching and processing onto computer tapes.

The analysis strategy was to compare the 19 common items across practitioner types and to thoroughly examine the responses on all other items. The responses were analyzed in relation to the background or demographic items. Finally, indexes of satisfaction with prior training programs and of future training needs were developed. The results are presented in the next section.

FINDINGS

The analysis strategies used in this study were intended to produce findings that would bear as directly as possible on the overall goals for the study. Briefly stated, these involved empirical surveys of the impact of prior training and assessment of future needs for training programs. The findings from these data are intended for use in investigating ". . . the possibilities of developing and implementing a coordination model for financial aid training activities and programs in the state."

Because this was the first such survey in Arizona of financial aid training impacts and future needs, it was also felt that the raw data as well as the resultant summary statistics should be fully reported so that the information could be used for more detailed analyses and as a bench mark for subsequent studies. This section of the report contains the findings from the following analyses: (1) Comparisons among the four respondent groups on demographic and institutional factors; (2) Comparisons among the four respondent groups on the nineteen financial aid items common to all four groups; (3) Development of indexes for these nineteen common items on both evaluation of prior training programs and need for future training programs; (4) Interaction between the two indexes; (5) Development of indexes on evaluation and needs on additional items specific to each of the four groups.

Demographic/Institutional Data

Table 1 shows that of the four respondent groups, administrators have by far the greatest longevity as practitioners in student financial aid. Exactly one-half of the 54 administrator respondents worked in a financial aid office for at least five years. Only one-fifth of them were new (less than one year) to the profession. In contrast, the other three respondent groups were comparatively new to student financial aid. About half of the counsellors and office staff respondents had worked in a financial aid office two years or less; the number of fiscal officer respondents is too small for reliable indications, nonetheless, the general pattern shown is one of greater newness to the field than any of the other three respondent groups.

The distribution of types of institutions represented by the respondents corresponded quite closely to the distribution of types of institutions sampled, and to general knowledge about staffing patterns among different types of institutions in Arizona. For example, as shown in Table 2, the largest single cluster of respondents was that of administrator in proprietary schools. As indicated earlier, in many of these schools the financial aid administrator also serves as counsellor, fiscal officer, and even office staff roles. Community

Table 1

Number of Years Respondents Worked for a Financial Aid Office

No. of Years Worked	Respondent							
	Administrators		Counselors		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Less Than One	11	20.4	10	34.5	13	30.9	9	50.0
Two	8	14.8	4	13.8	9	21.4	3	16.7
Two to Four	8	14.8	7	24.1	11	26.2	2	11.1
Five to Eight	13	24.1	6	20.7	7	16.7	2	11.1
Over Eight	14	25.9	2	6.9	2	4.8	2	11.1
Total	54	100.0	29	100.0	42	100.0	18	100.0

Table 2

Type of Institution Employing Respondent

Type of Institution	Administrator No.	Administrator %	Counselor No.	Counselor %	Office No.	Office %	Fiscal No.	Fiscal %
Community College	15	27.3	9	29.0	19	45.2	8	42.1
Proprietary	24	44.4	5	16.1	5	11.9	7	36.8
University	9	16.7	7	22.6	12	28.6	3	15.8
Private 4-Yr.	2	3.7	1	3.2	4	9.5	0	0.0
State Agency	1	1.9	3	9.7	1	2.4	0	0.0
County/City	3	5.6	6	19.4	1	2.4	1	5.3
Total	54	100.0	29	100.0	42	100.0	19	100.0

colleges are well represented across all respondent types as are the university institutions.

The 1978-1979 workshops sponsored by the Arizona Commission on Postsecondary Education were attended by relatively few fiscal officers and office staff. The other two types of respondents, especially administrators, were much better represented at these workshops (see Table 3). Over one-third of the administrator respondents attended both of the workshops; the percentages were only slightly smaller for counsellors.

Table 4 shows an interesting pattern of sources for acquiring knowledge of financial aid. In order to show these data in a single table, the rankings of the various sources were combined for all four groups of respondents. Clearly, informal apprenticeship might be a good way of characterizing the sources found most helpful in acquiring knowledge of financial aid. Over half of the respondents indicated that "Other Aid Practitioners" and "Own Reading/Study" has either first or second rank among all seven sources. Other sources found useful were "State Association" and "Federal Training Program," both of which were ranked among the top three by over half of the respondents. The two sources found least helpful were "Formal Courses" and "Regional Association," both of which were ranked either fifth, sixth, or seventh by over half of the respondents. This pattern of responses

Table 3

Attendance at 1978-79 Workshops Sponsored by
the Arizona Commission on Postsecondary Education

	Respondents							
Workshops	Administrators		Counselors		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
October, 1978								
Yes	20	34.5	10	30.3	8	18.6	3	15.8
No	38	65.5	23	69.7	35	81.4	16	84.2
Total	58	100.0	33	100.0	43	100.0	19	100.0
March, 1979								
Yes	22	37.9	9	27.3	6	14.0	1	5.3
No	36	62.1	24	72.7	37	86.0	18	94.7
Total	58	100.0	33	100.0	43	100.0	19	100.0

Table 4

Rankings of Sources Found Helpful in Acquiring Knowledge of Financial Aid

Sources	Rankings (all Respondents Combined)															
	First		Second		Third		Fourth		Fifth		Sixth		Seventh		Total	
	N	%	N	%	N	%	N	%	N	%	N	%	N	%	N	%
State Association	9	11.7	19	24.6	13	16.9	10	13.0	15	19.5	6	7.8	5	6.5	77	100.0
Other Aid Practicioners	33	37.5	18	20.5	15	11.1	11	12.5	7	7.9	3	3.4	1	1.1	88	100.0
Formal Courses	10	15.2	3	4.5	3	4.5	11	16.7	15	22.7	12	18.2	12	18.2	66	100.0
Own Reading/Study	28	27.2	31	30.1	18	17.5	15	14.6	2	1.9	8	7.8	1	0.9	103	100.0
Regional Association	3	4.4	5	7.3	14	20.6	10	14.7	8	11.8	15	22.1	13	19.1	68	100.0
Federal Training Program	11	15.3	8	11.1	14	19.4	12	16.7	10	13.9	8	11.1	9	12.5	72	100.0
Trial and Error	7	8.7	14	17.5	15	18.8	14	17.5	5	6.3	8	10.0	17	21.2	80	100.0

is probably as indicative of the availability of sources as it is of their helpfulness. For example, it is possible that formal courses could be quite helpful, however, very few are available to Arizona financial aid practitioners.

Table 5 shows the responses of administrators regarding who should have primary responsibility for their training. Over half (54%) indicated that a combination of a variety of agencies was most desirable. Another way of interpreting these data is that the administrators were reluctant to assign a monopoly on their training to any single source. However, 22% of the administrators indicated that the federal government should have primary responsibility while 12% believed that colleges and universities should have primary responsibility.

The final table showing demographic/institutional data is Table 6 which shows the distribution of the annual number of aid applicants. The distribution is slightly bimodal, with the majority of administrator respondents indicating that they had one thousand or fewer aid applicants each year. However, 17% of the respondents indicated that they had an extremely large number (over 5,000) of aid applicants annually. Again, this distribution corresponds to the type and size of institutions sampled.

Table 5

Who Should Have Primary Responsibility
For Training Aid Administrators
(Administrator Respondents Only)

	N	%
Federal Government	11	22.0
Colleges/Universities	6	12.0
AASFAA, SWASFAA, NASFAA	3	6.0
State Agencies	0	0.0
ACT, CSS	1	2.0
Combination of Above	27	54.0
Other	2	4.0
Total	50	100.0

Table 6

Annual Number of Aid Applicants (Administrator Respondents Only)

	N	%
Under 200	20	37.7
200-500	8	15.1
501-1000	6	11.3
1001-2000	5	9.4
2001-3000	4	7.5
3001-5000	1	1.9
Over 5000	9	17.0
Total	53	100.0

Evaluation of Prior Training Programs

The following analysis focuses on the nineteen items common to all four respondent groups. An index was developed to summarize the respondents' views of how well prior training programs had met their needs for information. This index was computed as the percentage of administrators reporting "Need Met Well" minus "Need Met Not At All." Tables 7 through 10 summarize the indexes for the nineteen common items among all four respondent groups. This index discriminated well among the nineteen items for all four respondent groups. Note that administrators ranked their prior training much higher than counsellors, office staff, and fiscal officers. The average index for all nineteen items combined for the four groups is -1.72 for administrators, -18.73 for counsellors, -21.53 for office staff and - 42.68 for fiscal officers. The relatively large number of positive rankings for administrators is probably a function of their exposure to many training programs compared to the other three groups, especially to fiscal officers who reported no positive rankings for the nineteen items. All four tables reveal significant discrimination among the items, consequently the analytic method enables identification of areas covered well (e.g., BEOG which is ranked highest by three groups and second by the fourth group), and also those which have not been covered well (e.g., Social Security which is ranked no higher than sixteen among the nineteen items by any of the four groups).

Table 7

Index of How Well Prior Training Programs Met Administrators Needs for Information*

1.	BEOG	41.2
2.	NDSL	38.0
3.	Renewal of Financial Aid	37.2
4.	Repayment of BEOG	34.0
5.	FISL	29.4
6.	College Work-Study	23.4
7.	Need Analysis	23.0
8.	Supplemental Grants	19.7
9.	Student Consumer Protection	11.7
10.	Student Rights and Responsibilities	8.0
11.	Exchanging Information About Students	4.0
12.	VA Benefits	- 7.9
13.	ACPE Student Aid Programs	-13.7
14.	Improving NDSL Collections	-27.8
15.	Reporting Fraud to HEW	-37.4
16.	Nursing/Health Profession Scholarships	-38.7
17.	Social Security	-52.5
18.	L.E.E.P.	-54.2
19.	Voc. Rehab. Grants	-70.0

*(Computed as percentage of administrators reporting "Need Met Well" minus "Need Met Not At All")

Table 8

Index of How Well Prior Training Programs Met Counselors Needs for Information*

1. BEOG	32.2
2. Renewal of Financial Aid	13.7
3. College Work-Study	7.0
4. FISL	3.5
5. Supplemental Grants	3.4
6. NDSL	- 3.4
7. L.E.E.P.	- 4.4
8. Repayment of BEOG	- 6.7
9. Student Rights and Responsibilities	- 6.9
10. Need Analysis	- 7.0
11. ACPE Student Aid Programs	-10.0
12. VA Benefits	-13.7
13. Exchanging Information About Students	-38.0
14. Voc. Rehab. Grants	-48.3
15. Student Consumer Protection	-48.4
16. Nursing/Health Profession Scholarships	-50.0
17. Improving NDSL Collections	-51.2
18. Social Security	-62.1
19. Reporting Fraud to HEW	-65.6

*(Computed as percentage of counselors reporting "Need Met Well" minus "Need Met Not At All")

Table 9

Index of How Well Prior Training Programs Met Office Staff Needs for Information*

1.	BEOG	38.3
2.	Renewal of Financial Aid	31.4
3.	College Work-Study	31.4
4.	Repayment of BEOG	20.6
5.	Supplemental Grants	17.7
6.	FISL	11.5
7.	NDSL	0.0
8.	Student Rights and Responsibilities	- 3.0
9.	Need Analysis	- 8.9
10.	Exchanging Information About Students	-21.2
11.	Student Consumer Protection	-41.1
12.	VA Benefits	-44.0
13.	L.E.E.P.	-50.0
14.	ACPE Student Aid Program	-53.0
15.	Nursing/Health Profession Scholarships	-59.9
16.	Improving NDSL Collections	-61.2
17.	Reporting Fraud to HEW	-62.4
18.	Social Security	-76.5
19.	Voc. Rehab. Grants	-78.8

*(Computed as percentage of office staff reporting "Need Met Well" minus "Need Met Not At All")

Table 10

Index of How Well Prior Training Programs Met Fiscal Officers Needs for Information*

1.	NDSL	- 6.2
2.	BEOG	-18.7
3.	Student Consummer Protection	-26.6
4.	Repayment of BEOG	-31.1
5.	Supplemental Grants	-31.4
6.	College Work-Study	-33.3
7.	Improving NDSL Collections	-33.3
8.	FISL	-40.1
9.	Student Rights and Responsibilities	-42.9
10.	Renewal of Financial Aid	-43.7
11.	Reporting Fraud to HEW	-53.3
12.	VA Benefits	-53.3
13.	Voc. Rehab. Grants	-53.3
14.	Need Analysis	-53.8
15.	ACPE Student Aid Programs	-57.1
16.	Exchanging Information About Students	-60.0
17.	Social Security	-64.3
18.	L.E.E.P.	-66.7
19.	Nursing/Health Profession Scholarships	-73.3

*(Computed as percentage of fiscal officers reporting "Need Met Well" minus "Need Met Not At All")

There was considerable similarity among the four groups on many items; but a number of items revealed strong differences probably reflective of amount of access to prior training programs. For example, the Law Enforcement Education Program (L.E.E.P.) was ranked eighteenth by two groups and thirteenth by a third, but counsellors ranked it seventh; three of the groups ranked "Renewal of Financial Aid" second or third, but fiscal officers ranked it only tenth. Thus, the rankings are related not only to the functional responsibilities of the four types of respondents, but also to access to prior programs and external factors such as the phasing out of programs such as L.E.E.P. and the Nursing/Health Profession Scholarships. A later table summarizes the rank in indexes for all four respondent groups combined.

Future Training Needs

Tables 11-14 summarize the findings on the assessment of future training needs and is intended to guide formulation of training programs in Arizona in the years immediately ahead. Again, a special index was developed which was intended to discriminate among the nineteen items common to all four respondent groups as well as to allow a standardized basis for analyzing differences among the four groups. The index used is the total of products computed by multiplying percentages responding by the following weights: 1=Weak Need; 2=Moderate Need; 3=Strong Need. This index successfully discriminated the

Table 11

Index of Need For More Training For Administrators*

1.	Voc. Rehab. Grants	172.2
2.	Social Security	163.7
3.	Reporting Fraud to HEW	162.6
4.	ACPE Student Aid Programs	157.0
5.	Exchanging Information About Students	145.7
6.	Student Rights and Responsibilities	141.2
7.	Improving NDSL Collections	136.2
8.	VA Benefits	136.1
9.	Student Consumer Protection	129.2
10.	FISL	124.2
11.	Repayment of BEOG	115.6
12.	Supplemental Grants	112.5
13.	Need Analysis	109.0
14.	BEOG	105.3
15.	Renewal of Financial Aid	94.9
16.	L.E.E.P.	92.6
17.	NDSL	85.9
18.	Nursing/Health Profession Scholarships	72.6
19.	College Work-Study	53.4

*(Index is total of products computed by multiplying percentage responding by the following weights: 1=Weak Need; 2=Moderate Need; 3=Strong Need)

Table 12

Index of Need For More Training For Counselors*

1.	ACPE Student Aid Programs	221.3
2.	Social Security	209.2
3.	Voc. Rehab. Grants	206.2
4.	Nursing/Health Profession Scholarships	187.9
5.	Student Rights and Responsibilities	184.1
6.	Exchanging Information About Students	181.5
7.	Supplemental Grants	177.9
8.	L.E.E.P.	171.0
9.	Repayment of BEOG	168.8
10.	VA Benefits	164.6
11.	BEOG	164.5
12.	Student Consumer Protection	164.3
13.	NDSL	161.2
14.	FISL	153.1
15.	Reporting Fraud to HEW	146.9
16.	Need Analysis	145.3
17.	Renewal of Financial Aid	138.7
18.	College Work-Study	119.4
19.	Improving NDSL Collections	115.5

*(Index is total of products computed by multiplying percentage responding by the following weights: 1=Weak Need; 2=Moderate Need; 3=Strong Need)

Table 13

Index of Need For More Training For Office Staff*

1.	ACPE Student Aid Programs	185.7
2.	Need Analysis	173.9
3.	Voc. Rehab. Grants	164.0
4.	Student Rights and Responsibilities	162.8
5.	Student Consumer Protection	160.0
6.	Exchanging Information About Students	159.6
7.	Supplemental Grants	157.1
8.	Repayment of BEOG	154.5
9.	Social Security	151.1
10.	BEOG	144.0
11.	Renewal of Financial Aid	138.1
12.	NDSL	135.8
13.	FISL	134.2
14.	VA Benefits	125.0
15.	Reporting Fraud to HEW	121.9
16.	Nursing/Health Profession Scholarships	112.9
17.	L.E.E.P.	112.8
18.	Improving NDSL Collections	102.5
19.	College Work-Study	102.4

*(Index is total of products computed by multiplying percentage responding by the following weights: 1=Weak Need; 2=Moderate Need; 3=Strong Need)

Table 14

Index of Need For More Training For Fiscal Officers*

1.	Exchanging Information About Students	221.0
2.	Voc. Rehab. Grants	211.1
3.	ACPE Aid Programs	205.5
4.	Reporting Fraud to HEW	205.4
5.	Improving NDSL Collections	205.1
6.	Supplemental Grants	200.1
7.	Renewal of Financial Aid	199.8
8.	Social Security	194.5
9.	VA Benefits	192.8
10.	NDSL	189.4
11.	FISL	188.8
12.	Student Consumer Protection	177.8
13.	Repayment of BEOG	177.7
14.	BEOG	166.8
15.	Need Analysis	164.8
16.	Student Rights and Responsibilities	155.4
17.	Nursing/Health Profession Scholarships	142.0
18.	L.E.E.P.	141.9
19.	College Work-Study	126.3

*(Index is total of products computed by multiplying percentage responding by the following weights: 1=Weak Need; 2=Moderate Need; 3=Strong Need)

nineteen common items and the four respondent groups. The data shows strong differences in degree of need for more training, with the administrators showing the least need (121.55) compared with counsellors (167.44), office staff (142.01) and fiscal officers (182.43) as a composite of all nineteen items. These tables reveal training needs related to functional areas, for example, the highly sensitive area for fiscal accounting and public relations (Reporting Fraud to HEW) is ranked highly by fiscal officers (fourth) and administrators (third). There is less of a concern for counsellors and office staff who both ranked it fifteenth. However, as was true for the evaluation indexes, there were both similarities and differences in the ranking of the items among the four respondent groups. For example, "Vocational Rehabilitation Grants" was ranked first by administrators, second by fiscal officers and third by both counsellors and office staff. Another item which was ranked consistently high was "ACPE Student Aid Programs." The only item which ranked consistently low was "College Work-Study" which ranked last (nineteenth) by three groups and eighteenth by the fourth group. In general this index discriminated among the four respondent groups most effectively. There were only a few items (those just noted) which ranked either consistently high or consistently low in need for more training among all four groups. Nearly all of the items were seen as of high need by some groups and of low need for more training by other groups. Thus, it is evident that future training programs should take into account the differential level of needs among these groups, and should be targeted quite specifically for each of the four groups. The two groups that seemed most similar in the pattern of need for more training were counsellors and office staff. This is not surprising since these two groups most consistently work directly with student concerns and thus have a common source of awareness for training needs.

Summary of Indexes on Nineteen Common Items

The index of how well prior programs met information needs is intended primarily for evaluation; the second index of need for more training is intended for a different dimension of training, that of assessment of future needs. These two indexes are related only when the overriding factor of operational importance is considered, e.g., an area like BEOG may have received the most prior training activity of any program (and indeed it has and is so ranked), yet the need for more training may be high because of the large scale of the program and/or the extensiveness and rapidity of procedural changes in the program. Or, an item may be ranked low on prior training and equally low on need for more training simply because it is not perceived as a high priority need at this time; for example, both "Nursing/Health Professions Scholarships" and "L.E.E.P." are ranked relatively low because financial aid practitioners perceive that their future

Table 15

Summary of Indexes on Evaluation of Prior Training Programs and Need For More Training

Rank of Indexes of How Well Prior Training Programs Met Needs (all four respondent groups combined)

	Average Rank and Index
BEOG	1.25 (14.00)
Renewal of Financial Aid	3.00 (9.65)
NDSL	4.00 (7.10)
College Work-Study	4.50 (7.12)
Repayment of BEOG	4.75 (6.10)
Supplemental Grants	5.75 (2.35)
FISL	5.75 (1.07)
Student Rights and Responsibilities	9.00 (-11.20)
Student Consumer Protection	9.50 (-26.10)
Need Analysis	10.00 (-11.67)
VA Benefits	12.00 (-29.70)
Exchanging Information About Students	12.50 (-28.87)
ACPE Student Aid Programs	13.25 (-33.41)
Improving NDSL Collections	13.50 (-43.49)
L.E.E.P.	14.00 (-43.82)
Reporting Fraud to HEW	15.50 (-54.75)
Voc. Rehab. Grants	16.25 (-62.66)
Nursing/Health Profession Scholarships	16.50 (-55.43)
Social Security	17.50 (-63.85)

Rank of Indexes of Need For More Training (all four respondent groups combined)

	Average Rank and Index
ACPE Student Aid Programs	2.25 (192.37)
Voc. Rehab. Grants	2.25 (188.37)
Exchanging Information About Students	4.50 (176.95)
Social Security	5.25 (141.85)
Student Rights and Responsibilities	7.75 (160.87)
Supplemental Grants	8.00 (161.90)
Reporting Fraud to HEW	9.25 (159.20)
Student Consumer Protection	9.50 (157.82)
VA Benefits	10.25 (154.62)
Repayment of BEOG	10.25 (154.15)
Need Analysis	11.50 (148.25)
FISL	12.00 (150.07)
BEOG	12.25 (145.15)
Improving NDSL Collections	12.25 (139.82)
Renewal of Financial Aid	12.50 (142.87)
NDSL	13.00 (143.08)
Nursing/Health Profession Scholarships	13.75 (128.85)
L.E.E.P.	14.75 (129.56)
College Work-Study	18.75 (100.37)

involvement with these programs, both of which are being phased out by Congress, will be minimal. However, a careful comparison of Tables 7 through 10 with Tables 11 through 14 shows that in general a low ranking on how well prior training met information needs is related to a high level of need for more training on that item. Table 15 shows the average indexes for both prior program evaluation and index of future need aggregated across all four respondent groups. Interpretation should be conditioned by the strong overall differences among the groups and the specific differences on many of the items. Note that only "Vocational Rehabilitation Grants" and "ACPE Student Aid Programs" are ranked as an extremely high priority need for more training by all four groups. Evidently the recent federal rules and regulations regarding legislation for the handicapped had impacted nearly every campus with a clear need for information; the state's major new program of student financial aid (SSIG) is relatively new and is administered by the Arizona Commission on Postsecondary Education. Hence, the need for future training programs in regard to this relatively new program and the impending Guaranteed Student Loans program account for the relatively high ranking. It would seem that a training experience on a topic like vocational rehabilitation regulations affecting financial aid could be broadly offered to the entire community of practitioners. Also ranked high are concerns about students, namely, "Exchanging Information About Students" and "Student Rights and Responsibilities" which reflect the increasing awareness of students about financial aid, their increasing sophistication about their consumer rights and the sensitivity of financial aid practitioners to legal issues concerning rights of privacy. The item that is ranked last in terms of how well prior training programs met information needs is "Social Security," despite the fact that it evidently affects most financial aid practitioners in many, if not most, institutions. The relatively high ranking of "Social Security" as a need for future training is probably due to both the relatively low evaluation of prior training programs combined with the continuing importance of this program in the financial aid picture. Conversely, "College Work-Study" is an important area for only certain types of institutions. Furthermore, it has been well covered by prior training programs. Therefore, it is ranked last in terms of need for future training along with the two programs described previously as being phased out ("Nursing/Health Profession Scholarships" and "LEEP"). Three factors are also ranked low in terms of need for more training, ("NDSL," "Renewal of Financial Aid," "BEOG"), but their ranking is evidently attributable to relatively high evaluations of how well prior training programs met information needs.

Items Specific to Each of the Four Respondent Groups

Tables 16 through 19 contain the indexes of how well prior training programs met information needs and the need for future training of the large number of items specific to each of the four groups. It should be noted that while nearly all of the items are specific to a single respondent group, several of the items are common to two or three of the groups. However, none of the items depicted in Tables 16-19 are common to all four groups. The data are shown in this detail because they provide specific guidelines to future training program planners. The indexes discriminate well in terms of the strength of need among the four groups. For example, fiscal officers show a very high level of need for the 41 items specific to their functional responsibility: the range of need index is from 220.9 to 116.8 compared with 180.6 to 71.14 for counsellors, 173.2 to 62.7 for administrators and 158.7 to 79.0 for office staff. A highly differentiated priority of training needs is revealed by these statistics. Finally, it should be noted that two appendices contain full sets of the data on which the indexes discussed in this section are based. Appendix E contains the full set of responses on the nineteen items common to all four groups; Appendix F contains the full set of raw data for all items on both needs assessment dimensions for all four respondent groups. All of the indexes discussed in the present section can be reconstructed from this set of raw data.

Table 16

Indexes of Evaluation of Prior Training Programs and Need for More Training — 45 Specific Items for Administrators Only

Item	Index of Need for More Training *	Index of How Well Prior Training Program Met Needs **
I need to know the financial aid policies of other awarding agencies, such as CETA, and REHABILITATION.	173.2	-47.9
I need to know how to develop better publications and information materials for students.	166.8	-33.2
I need to know what financial aid data processing techniques are available.	159.5	-17.7
I need to know how to coordinate institutional programs of aid with outside resources such as CETA, REHABILITATION, etc.	152.7	-36.8
I need to know information on auditing procedures for the various financial aid programs.	146.3	-2.1
I need to know more about the new SSIG program in Arizona.	144.3	-8.3
I need to know how to make and document adjustments to needs analysis forms.	137.1	8.3
I need to know more about procedures for internal management of the financial aid office.	136.6	8.0
I need to know how to reduce the number of defaults on student loans, and steps to take with students who default.	132.7	-4.3

Table 16 (Contd.)

I need to know about exit interviews for students on loans.	126.7	-10.4
I need to know more about the interrelationship of state and federal programs.	125.9	4.0
I need to know how to develop a system whereby my office will be notified when a student receiving aid withdraws or drops courses.	123.4	4.1
I need to know how to implement affirmative action for student employees.	121.7	-40.4
I need to know more about policies for fair and equitable refunds.	117.8	-8.4
I need to know how to develop student expense budgets.	116.4	22.5
I need to know how part-time jobs other than through the financial aid office affect eligibility for financial aid.	116.2	26.0
I need to know how to package aid more equitably.	114.4	18.0
I need to have assistance in updating and building consistent, equitable student budgets.	112.7	22.0
I need to know how to distinguish anticipated loan collections relendable from those collected too late to relend.	112.6	-40.5
I need to know about billing and collection agencies.	107.3	-21.7
I need to know how to develop an evaluation system for student performance on the work-study program.	105.5	-30.4

Table 16 (Contd.)

I need to know how to determine if I have need for additional staff.	105.4	-18.0
I need assistance in preparing internal and external reports.	105.1	0.0
I need to know how student budget and family contribution affect student eligibility for aid.	103.6	40.0
I need to know where I can obtain more material to assist students and parents in understanding financial aid.	101.7	30.6
I need to receive more timely and effective communication from aid associations such as AASFAA, WASFAA, and NASFAA.	100.1	21.2
I need to know how to determine awarding priorities for CWSP, SEOG, and NDSL.	98.0	27.1
I need to know some guidelines in establishing academic standards for receiving aid.	96.3	28.0
I need to know how to control expenditures within approved levels of operation.	96.2	-4.2
I need to know what criteria must be met by my institution to be eligible for participation in federal and state programs.	94.7	-24.2
I need more information about educational program costs to help students plan for a post-secondary education.	94.6	25.5
I need to better understand the relationship between the aid office, business office, and admissions.	92.5	14.9

Table 16 (Contd.)

I need to know how to coordinate counseling and referral functions with aid office operations.	91.4	8.2
I need to know how to develop a student budget when only one parent is involved in the student's support.	87.5	16.6
I need to know how to implement and manage an off-campus College Work-Study Program.	84.9	-37.7
I need to have more control over policy-making in financial aid practices on my campus.	83.7	4.3
I need to know if and how funds can be transferred from one federal program to another.	82.1	18.7
I need to know what additional financial aid programs are available to students who are eligible for Basic Grant.	81.6	51.1
I need to know how to develop and implement a summer College Work-Study program.	81.1	-24.4
I need to know more about job location for CWS.	77.3	-17.7
I need to know how the Financial Aid Form is related to Basic Grant.	76.2	40.4
I need to know how to help people complete an application for funds.	70.0	55.1
I need to know how a student can qualify for a deferment of principal and interest on a NDSL.	68.9	31.4

Table 16 (Contd.)

I need to know what type of educational program qualifies a student for receiving Basic Grant.	63.0	52.1
I need to know how to interpret a Basic Grant Student Eligibility Report.	62.7	56.3

* (Index is total of products computed by multiplying percentage responding by the following weights: 1=Weak Need; 2=Moderate Need; 3=Strong Need)

**(Computed as percentage of administrators reporting "Need Met Well" minus "Need Met Not At All")

Table 17

Indexes of Evaluation of Prior Training Programs and Need for More Training -- 24 Specific Items for Counsellors Only

Item	Index of Need for More Training *	Index of How Well Prior Training Program Met Needs **
I need to know more about matching funds for federal programs.	180.6	-20.7
I need to know if and how funds can be transferred from one federal program to another.	178.0	-34.6
I need to know how the student financial aid budget is built.	177.3	-13.8
I need to know my role in providing information about financial aid.	162.5	0.0
I need to know how financial aid office records interface with fiscal office records.	162.5	-4.3
I need to know how to reduce the number of defaults on student loans, and steps to take with students who default.	162.4	-38.0
I need to know how federal programs can be better related to the total financial structure.	161.4	-17.2
I need to know information on auditing procedures for the various financial aid programs.	158.2	-41.4
I need to know how to better expedite disbursement of student aid funds.	157.9	-44.8

Table 17 (Contd.)

I need to know the disbursement regulations for the federal programs.	154.9	-50.0
I need to have input in policy-making decisions relative to financial aid.	154.8	-31.1
I need an explicit definition of the role of the fiscal officer in student aid.	153.3	-44.9
I need to know how to develop better guidelines pertaining to student obligations for educational-loan repayments.	150.0	-44.9
I need to know how a student can qualify for a deferment of principal and interest on a NDSL.	149.9	3.6
I need to know the role of the financial aid administrator.	148.3	-6.9
I need to know what criteria must be met by my institution to be eligible for participation in federal and state programs.	147.0	-14.3
I need assistance in preparing internal and external reports.	141.8	-51.7
I need to know my responsibilities for student loan collections.	134.6	-44.9
I need to know the management cycle of the financial aid office.	134.5	-34.5
I need to know how to develop a system whereby my office will be notified when a student receiving aid withdraws or drops courses.	131.5	-48.3
I need to know how to control expenditures within approved levels of operation.	128.4	-41.4

Table 17 (Contd.)

I need to know how to distinguish anticipated loan collections relendable from those collected too late to relend.	125.1	-58.6
I need cooperation from the aid office in preparing reports.	113.3	-50.0
I need more coordination with the aid office in the collection of loans.	71.1	-55.2

* (Index is total of products computed by multiplying percentage responding by the following weights: 1=Weak Need; 2=Moderate Need; 3=Strong Need)

**(Computed as percentage of administrators reporting "Need Met Well" minus "Need Met Not At All")

Table 18

Indexes of Evaluation of Prior Training Programs and Need for More Training — 24 Specific Items for Office Staff Only

Item	Index of Need for More Training *	Index of How Well Prior Training Program Met Needs **
I need to know how the student financial aid budget is built.	158.7	5.7
I need to know the disbursement regulations for the federal programs.	148.8	-8.5
I need to know how to better expedite disbursement of student aid funds.	145.2	-17.2
I need to know how federal programs can be better related to the total financial structure.	143.9	-26.5
I need to know my role in providing information about financial aid.	140.3	19.3
I need to know more about matching funds for federal programs.	140.0	-14.2
I need to know how financial aid office records interface with fiscal office records.	133.5	-47.0
I need to know how a student can qualify for a deferment of principal and interest on a NDSL.	133.3	0.0
I need to know how to develop a system whereby my office will be notified when a student receiving aid withdraws or drops courses.	133.3	-29.4

Table 18 (Contd.)

I need to know if and how funds can be transferred from one federal program to another.	128.5	-30.4
I need to know information on auditing procedures for the various financial aid programs.	126.9	-52.9
I need to know what criteria must be met by my institution to be eligible for participation in federal and state programs.	126.8	-27.3
I need to have input in policy-making decisions relative to financial aid.	122.5	-45.4
I need an explicit definition of the role of the fiscal officer in student aid.	117.8	-18.2
I need assistance in preparing internal and external reports.	115.0	-36.3
I need to know my responsibilities for student loan collections.	115.0	-51.6
I need to know how to reduce the number of defaults on student loans, and steps to take with students who default.	113.2	-62.5
I need to know the role of the financial aid administrator.	112.5	6.0
I need cooperation from the aid office in preparing reports.	107.6	-40.6
I need to know how to distinguish anticipated loan collections relendable from those collected too late to relend.	97.5	-90.3
I need to know the management cycle of the financial aid office.	95.1	6.2

Table 18 (Contd.)

I need to know how to develop better guidelines pertaining to student obligations for educational loan repayments.	92.5	-48.4
I need to know how to control expenditures within approved levels of operation.	81.9	-57.6
I need more coordination with the aid office in the collection of loans.	79.0	-53.1

* (Index is total of products computed by multiplying percentage responding by the following weights: 1=Weak Need; 2=Moderate Need; 3=Strong Need)

**(Computed as percentage of administrators reporting "Need Met Well" minus "Need Met Not At All")

Table 19

Indexes of Evaluation of Prior Training Programs and Need for More Training — 41 Specific Items for Fiscal Officers Only

Item	Index of Need for More Training *	Index of How Well Prior Training Program Met Needs **
I need to know more about the interrelationship of state and federal programs.	220.9	-53.3
I need to know where to find information about monies available to students on a no-need basis.	211.0	-60.0
I need to know what criteria must be met in order to be eligible for a State Grant.	205.6	-64.3
I need to know about financial aid packaging.	188.8	-40.0
I need to be informed when students withdraw or drop classes.	183.4	-20.0
I need to know what financial aid programs are available to students who are not eligible for Basic Grant.	183.4	-57.1
I need to know if and when funds are available on a "no need" basis.	183.3	-64.3
I need to know how to determine when an institutional aid application is required in addition to a needs analysis form.	183.3	-53.3
I need to know how part-time jobs other than through the financial aid office affect eligibility for financial aid.	179.7	-42.9

Table 19 (Contd.)

I need to know my role in providing information about financial aid.	178.8	-18.7
I need to know how the family contribution is computed.	175.2	-50.0
I need to know where to get information about costs for various postsecondary institutions.	172.3	-73.0
I need to know how a student can appeal a financial aid decision.	172.2	-85.7
I need to know more about how to maintain records efficiently.	172.2	-21.5
I need to know more about exit interviews.	166.9	-26.6
I need to know about bankruptcy deferment for students unable to repay.	166.6	-35.8
I need to know the minimum income that students need to file.	161.1	-35.8
I need to know how high schools can assist financial aid administrators.	161.1	-57.2
I need to know how the Financial Aid Form is related to Basic Grant.	161.1	-64.3
I need to know how student budget and family contribution affect student eligibility for aid.	160.0	-40.0
I need more information about program costs to help students plan for a postsecondary education.	158.9	-57.1
I need to know how the Financial Aid Form is used in Arizona.	158.2	-66.7

Table 19 (Contd.)

I need to know how to interpret a Basic Grant Student Eligibility Report.	155.5	-50.0
I need to know what financial aid information students need.	155.4	-48.8
I need to know why student need and awards can differ from institution to institution.	154.8	-50.0
I need to know at what schools in the state students can use Basic Grants	151.0	-71.4
I need to know the distinction between providing basic information and counseling.	150.5	-28.6
I need to know what type of educational program qualifies a student for receiving Basic Grant.	150.0	-64.3
I need to know when students should apply for financial aid.	149.9	-33.3
I need to know how a student can qualify for a deferment of principal and interest on a NDSL.	147.4	6.3
I need to know information that will assist me in helping students apply for the Basic Grant.	144.5	-50.0
I need to know how to help people complete an application for funds.	144.4	-52.1
I need to know where I can obtain more material to assist students and parents in understanding financial aid.	143.9	-57.1
I need to know how to do student evaluations on the work-study program.	138.9	-50.0
I need more information about needs analysis.	135.1	-42.0

Table 19 (Contd.)

I need to know what financial aid information parents need.	133.5	-50.0
I need to know if aid is transferrable from institution to institution.	133.3	-57.1
I need more time for individual student contact.	129.2	-61.5
I need to know how to interpret an award letter.	117.7	-15.4
I need to know how to identify summer employment opportunities for pre-freshman.	117.6	-57.2
I need to know how to coordinate counseling and referral functions with aid office operation.	116.8	-64.3

* (Index is total of products computed by multiplying percentage responding by the following weights: 1=Weak Need; 2-Moderate Need; 3=Strong Need)

**(Computed as percentage of administrators reporting "Need Met Well" minus "Need Met Not At All")

CONCLUSIONS AND RECOMMENDATIONS

Several principal conclusions emerge from the findings of this survey. The Arizona student financial aid practitioners responding to this survey indicate that prior training programs provided good background in many functional areas. However, the contacts with these prior programs have been mainly by administrators. Other types of practitioners (counsellors, office staff, and fiscal officers) have had much less contact and consequently evaluate the impact of such programs on their activities as minimal. The programs have concentrated effectively on some functional and program areas and have virtually neglected others. The data collected and analyzed in this survey identify the relative effectiveness and impact of the programs on a large number of functional areas.

The level of need for further training programs is sharply different among the four respondent groups; furthermore, the need levels are different for many functional areas within each group. These variances should be taken directly into account in planning the content of future training programs for different target groups.

The strong differences among the four respondent groups on both the extent to which prior programs met needs and the present need for more training creates a dilemma for planning future programs: It is clearly vital for the administrator to be well informed via continuing inservice training, but is this improved effectiveness negated by the lack of training for key support and ancillary staff?

This type of difficult question leads to consideration of the complex and sensitive problem of coordination of training programs for financial aid professionals. It is difficult for a researcher somewhat removed from the arena of actual practice to suggest workable approaches, much less "solutions." What is intuitively or observationally obvious may not be adequately sensitized to the long history and set of personalities that are a part of the present situation. It seems clear that AASFAA must be centrally involved in coordinating training activities. While it does not enjoy majority membership among all Arizona postsecondary institutions, it has no strong competitor as a voluntary professional association. Neither WASFAA nor NASFAA could at this time hope to be as responsive to the needs of Arizona as the state association. Yet, it has very limited resources and must of necessity rely on additional resources donated by ACT, the WASFAA/NASFAA Financial Aid Consultants or other organizations, or mandated input as from the Region IX office in San Francisco, the Consortium project supported by OE, or the SSFAT program administered by ACPE.

Surveys of training needs in two other states have led to development of coordination models of interest to this study. The Texas College and University System Coordinating Board (1978) developed a model for the structure and function of the SSFAT Program of Texas. The coordination model calls for three main programmatic thrusts:

> The Welcome Wagon Program involves the SSFATP of Texas in providing materials for self-paced learning to new student financial aid administrators who are seeking familiarity with the array of financial aid programs offered by the federal government, the state, and institutions.
>
> The Campus Visitation Program enables the financial aid officer to have training at the home campus. The program was designed especially for aid officers who want their staffs to participate in training activities but because of various reasons can not send counselors, clerks, secretaries, and part time employees to workshops held in another city.
>
> The Workshop Supplement Program involves the participation of an SSFATP trainer in traditional workshops requiring financial aid directors and their staffs to travel to a central location. SSFATP trainers may provide a part of the training in such workshops. Coordinating Board staff members participate as trainers in this program as well as the Campus Visitation Program. All three of these programs are subject to continued development through evaluation, updating, and redesign.

These thrusts are coordinated by a SSFATP Planning group. "Thirty individuals representing a broad spectrum of views and functions within the financial aid community comprised the planning group of SSFATP of Texas. These thirty individuals serve on a voluntary basis. All members of the Texas Association of Student Financial Aid Administrators executive committee serve in the planning group" (p. III-7).

Virginia developed a somewhat different model for coordination of their financial aid training programs (Bob and Lee, 1979). "Emerging from the current proliferation of training activities is a theoretical grass roots model which contains the multiple appeal of cost efficiency, coordination, and cooperation among the various administrators involved in the financial aid process (Page 15). " . . . SSFATP training activities were coordinated with two previously separate activities: the annual College Scholarship Service Need Analysis Workshop, and the VASFAA meetings . . . . The only training activity in Virginia which was not coordinated with the SSAFTP was the Student Financial Assistance Training Program offered by the U. S. Office of Education which did not provide for any state coordination. The ultimate goal in Virginia is total coordination of all training activities (p. 19)." The Virginia planning group also considered formal credit courses as part of their comprehensive training model:

> As another means of increasing the professional development of financial aid administrators, a graduate curriculum proposal was developed and offered, along with survey results which showed the need for such a curriculum, to Virginia Polytechnic Institute and State University. The College of Education at Virginia Polytechnic Institute and State University is now offering an Institute on Financial Aid Administration which provides a series of graduate credit courses. This accomplishment will allow individuals to obtain the "credentials" needed to achieve additional status in the academic community (p. 19).

The following recommendations include the results of discussion of a preliminary version of this report with AASFAA members at Phoenix College on February 4, 1980, subsequent discussions with ACPE staff, and the SSFATP phase IV proposal developed on the basis of the findings of this study.

It is recommended that a part of the SSFAT funds for the next two fiscal years be allocated for comprehensive planning of training activities which would:

(a) continue the assessment of needs for training through an annual small-scale sample survey

(b) be responsive to the new federal regulations resulting from reauthorization

(c) be particularly sensitive to the needs of not only administrators but all support and ancillary staff

(d) utilize the findings on need for training on various topic areas generated by this study

Further, it is recommended that

(e) these aims be carried out by a planning committee appointed for two years and which is broadly representative of all sectors of postsecondary institutions (regardless of association affiliation) and of the federal/state agencies as well as ACT and the state, regional and national levels of professional associations. This breadth of representation should nonetheless be focused and coordinated by highly qualified members of AASFAA. Attention should also be given to including the interests of both postsecondary students and high school counselors. It is recognized that the present SSFAT regulations preclude direct support for some of the groups mentioned. However, H. B. 5192 now being considered by Congress widens the purview of support and could include such groups in the next fiscal year. In the interim, they could be included through an observer or adjunct status. Single year funding could be accommodated by reconstituting the group each year.

Discussion at the February 4 meeting brought out a broad concern for building professionalism at all levels of practitioners. It was pointed out that certification for administrators did not seem to be a possibility in the immediate future for various reasons at the state, regional or national level. The following recommendation refers to this problem as well as to the findings of this survey. SSFAT funds could be used to commission the development of a standardized training course for support staff (counselors and office staff). Successful completion of the course would signify competence in financial aid practice and comprise the basis for a rudimentary type of certification. If successful, this development would also provide the basis for extending the concept of certification to other practitioners such as fiscal officers and have particular application to the need for increasing professionalism among administrators through standardization of training, both preservice and inservice.

Finally, the findings of this survey clearly identified areas of much needed training, both those that were specific to practitioner groups and those that were common to all groups. Many of these areas relate to public programs such as Social Security, Veterans Administration and Vocational Rehabilitation, which have substantial training activities and resources. The training programs of these agencies could be adapted and utilized directly for financial aid practitioners. Their resources would be applied appropriately and effectively; much needed training would be obtained by the financial community.

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APPENDIXES

Appendix A

ARIZONA COMMISSION FOR POSTSECONDARY EDUCATION

SUITE 115
1650 W. ALAMEDA DRIVE
TEMPE, ARIZONA 85282

TELEPHONE (602) 271-3109

May 18, 1979

Dear Administrator:

The Arizona Commission for Postsecondary Education is undertaking a research project under the State Student Financial Assistance Training Program. The project will develop a coordination model for inservice training programs for student financial aid practicioners.

An essential part of our preliminary activities is to review the efforts of other states who may have undertaken similar projects. Thus, we are specifically requesting reports of any recent projects your agency may have sponsored on the following topics:

1. Surveys of training needs of student financial aid practicioners (including administrators, counselors, staff and fiscal officers).
2. Research on student applicants for aid, including studies of awareness of programs, participation rates, characteristics of applicants, and applicant views of administrative practices.
3. Evaluation of training programs for practicioners.

We would appreciate receiving any copies of such reports as soon as possible. Please advise if there will be a charge for the reports. We will be pleased to send you a complimentary copy of our project report next January.

Sincerely,

Robert H. Fenske

Robert H. Fenske
Project Primary Investigator

RAF/pr

Appendix B

Arizona Association of
Student Financial Aid Administrators

April 12, 1979

Dear Colleague:

As part of Arizona's proposal to participate in the State Student Financial Assistance Training Program for 1979-80, a very scientific assessment of financial aid administrator training needs will be initiated. Heading the research team, which will include representatives from AASFAA, Arizona Commission for Postsecondary Education, support staff, and counselors, will be Dr. Robert Fenske, Professor of Higher Education at Arizona State University. As many of you know, Dr. Fenske has done considerable research in the financial aid area, and his knowledgeable approach to the study will give considerable authority to its results.

The research survey is scheduled to be mailed in the near future. My purpose in writing to you at this point is simply to alert you regarding the importance of the study to our future training needs and to sincerely urge each and everyone to assist by participating in the completion of the survey instrument.

Please call Dr. Bob Bowman of the Commission on Postsecondary Education or myself if you have any questions.

Sincerely,

Dennis L. Hegle

Dennis L. Hegle, President
Arizona Association of
Student Financial Aid Administrators

DLH:pt

Appendix C

FINANCIAL AID ADMINISTRATOR
Training Needs Survey

By participating in this training needs survey, you can help plan a program of training services to help you meet your identified needs.

As you respond to each item, please think of how previous training programs have provided information necessary for your work, and what your present need is for additional information.

Directions:

1. Read each need statement carefully and respond, by checking the appropriate box, first to the extent to which training programs you have attended in Arizona and elsewhere have met your informational needs; then indicate your present need for more training on each subject by checking the appropriate box.

2. At the end of the list, please add any subject you feel are important, and indicate the extent of your need for more training on those subjects.

	Prior Training Programs Met Information Need:			Present Need for More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
Example: A. I need to know what BEOG is:	☒			☒			

(Note: This response shows that prior training programs met information needs well, and that there is no present need for more training.)

B. I need to know about the new SSIG program in Arizona:			☒			☒	

(Note: This response shows that prior training programs met information not at all, and that there is a moderate need for training at the present time.)

Please proceed to the remaining items:

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
1. I need to know more about Supplemental Grants.							
2. I need to know more about Law Enforcement Education Programs.							
3. I need to know more about Nursing or Health Profession Scholarships.							
4. I need to know how to package aid more equitably.							
5. I need to know more about Basic Educational Opportunity Grants.							
6. I need to know more about Social Security for postsecondary education.							
7. I need to know more about the Arizona Commission for Postsecondary Education student assistance programs.							

BEST COPY AVAILABLE

	Prior Training Programs met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
8. I need to know what obligations a student has to repay his Basic Grant if he terminates his academic program.							
9. I need to know what conditions must be met for the renewal of financial aid each year.							
10. I need to know how a student can qualify for a deferment of principal and interest on a NDSL.							
11. I need to know more about the College Work-Study Program.							
12. I need to know more about Vocational Rehabilitation Grants.							
13. I need to know more about National Direct Student Loans.							
14. I need to know more about Federally Insured Student Loans.							
15. I need information about student-consumer protection.							
16. I need to know more about Veterans Administration benefits for postsecondary education.							
17. I need to know how to develop better publications and information materials for students.							
18. I need to know what financial aid data processing techniques are available.							
19. I need to better understand the relationship between the aid office, business office, and admissions.							
20. I need to receive more timely and effective communication from aid associations such as AASFAA, WASFAA, and NASFAA.							
21. I need to have assistance in updating and building consistent, equitable student budgets.							
22. I need to have more control over policy-making in financial aid practices on my campus.							
23. I need to know how to coordinate counseling and referral functions with aid office operations.							

	Prior Training Programs met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
24. I need to know more about the interrelationship of state and federal programs.							
25. I need assistance in preparing internal and external reports.							
26. I need to know how to develop a system whereby my office will be notified when a student receiving aid withdraws or drops courses.							
27. I need to know how to control expenditures within approved levels of operation.							
28. I need to know information on auditing procedures for the various financial aid programs.							
29. I need to know how to reduce the number of defaults on student loans, and steps to take with students who default.							
30. I need to know the procedure for detecting and referring fraud cases to the Department of Health, Education, and Welfare.							
31. I need alternatives for improving the collection rate for NDSL at my institution.							
32. I need to know if and how funds can be transferred from one federal program to another.							
33. I need to know what criteria must be met by my institution to be eligible for participation in federal and state programs.							
34. I need to know how to distinguish anticipated loan collections relendable from those collected too late to relend.							
35. I need to know more about procedures for internal management of the financial aid office.							
36. I need to know the theory and methodology of need analysis.							
37. I need to know the legal implications of exchange of student information between institutions and agencies.							

	Prior Training Programs met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
38. I need to know how to focus on student responsibility as well as student rights under financial aid programs.							
39. I need to know how to interpret a Basic Grant Student Eligibility Report.							
40. I need to know to help people complete an application for funds.							
41. I need to know where I can obtain more material to assist students and parents in understanding financial aid.							
42. I need to know how the Financial Aid Form is related to Basic Grant.							
43. I need to know what additional financial aid programs are available to students who are eligible for Basic Grant.							
44. I need to know what type of educational program qualifies a student for receiving Basic Grant.							
45. I need to know how part-time jobs other than through the financial aid office affect eligibility for financial aid.							
46. I need more information about educational program costs to help students plan for a postsecondary education.							
47. I need to know how to make and document adjustments to needs analysis forms.							
48. I need to know how to determine if I have need for additional staff.							
49. I need to know how student budget and family contribution affect student eligibility for aid.							
50. I need to know how to determine awarding priorities for CWSP, SEOG, and NDSL.							
51. I need to know some guidelines in establishing academic standards for receiving aid.							
52. I need to know how to develop student expense budgets.							

	Prior Training Programs met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
53. I need to know how to develop and implement a summer College Work-Study program.							
54. I need to know how to implement and manage an off-campus College Work-Study Program.							
55. I need to know how to develop an evaluation system for student performance on the work-study program.							
56. I need to know how to coordinate institutional programs of aid with outside resources such as CETA, REHABILITATION, etc.							
57. I need to know how to develop a student budget when only one parent is involved in the student's support.							
58. I need to know the financial aid policies of other awarding agencies, such as CETA, and REHABILITATION.							
59. I need to know about billing and collection agencies.							
60. I need to know more about job location for CWS.							
61. I need to know more about policies for fair and equitable refunds.							
62. I need to know about exit interviews for students on loans.							
63. I need to know how to implement affirmative action for student employees.							
64. I need to know more about the new SSIG program in Arizona.							
Note: Please add items of your own below:							
65.							
66.							
67.							
68.							

OFFICE STAFF

Training Needs Survey

By participating in this training needs survey, you can help plan a program of training services to help you meet your identified needs.

As you respond to each item, please think of how previous training programs have provided information necessary for your work, and what your present need is for additional information.

Directions:

1. Read each need statement carefully and respond, by checking the appropriate box, first to the extent to which training programs you have attended in Arizona and elsewhere have met your informational needs; then indicate your present need for more training on each subject by checking the appropriate box.

2. At the end of the list, please add any subject you feel are important, and indicate the extent of your need for more training on those subjects.

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
Example: A. I need to know what BEOG is:	☒			☒			

(Note: This response shows that prior training programs met information needs well, and that there is no present need for more training.)

B. I need to know about the new SSIG program in Arizona:			☒			☒	

(Note: This response shows that prior training programs met information not at all, and that there is a moderate need for training at the present time.)

Please proceed to the remaining items:

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
1. I need to know more about Nursing or Health Profession Scholarships.							
2. I need to know more about Basic Educational Opportunity Grants.							
3. I need to know more about Social Security for postsecondary education.							
4. I need to know more about the Arizona Commission for Postsecondary Education student assistance programs.							
5. I need to know more about Supplemental Grants.							

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
6. I need to know what obligations a student has to repay his Basic Grant if he terminates his academic program.							
7. I need to know what conditions must be met for the renewal of financial aid each year.							
8. I need to know how a student can qualify for a deferment of principal and interest on a NDSL.							
9. I need to know more about the College Work-Study Program.							
10. I need to know more about Vocational Rehabilitation Grants.							
11. I need to know more about National Direct Student Loans.							
12. I need to know more about Federally Insured Student Loans.							
13. I need to know more about Law Enforcement Education Programs.							
14. I need information about student-consumer protection.							
15. I need to know more about Veterans Administration benefits for postsecondary education.							
16. I need to have input in policy-making decisions relative to financial aid.							
17. I need more coordination with the aid office in the collection of loans.							
18. I need cooperation from the aid office in preparing reports.							
19. I need to know the disbursement regulations for the federal programs.							
20. I need to know how the student financial aid budget is built.							
21. I need to know how federal programs can be better related to the total financial structure.							

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
22. I need to know more about matching funds for federal programs.							
23. I need to know how to better expedite disbursement of student aid funds.							
24. I need to know the role of the financial aid administrator.							
25. I need an explicit definition of the role of the fiscal officer in student aid.							
26. I need assistance in preparing internal and external reports.							
27. I need to know how to develop a system whereby my office will be notified when a student receiving aid withdraws or drops courses.							
28. I need to know how to control expenditures within approved levels of operation.							
29. I need to know information on auditing procedures for the various financial aid programs.							
30. I need to know how to reduce the number of defaults on student loans, and steps to take with students who default.							
31. I need to know how to develop better guidelines pertaining to student obligations for educational loan repayments.							
32. I need to know my role in providing information about financial aid.							
33. I need to know my responsibilities for student loan collections.							
34. I need to know the procedure for detecting and referring fraud cases to the Department of Health, Education, and Welfare.							
35. I need alternatives for improving the collection rate for NDSL at my institution.							
36. I need to know if and how funds can be transferred from one federal program to another.							

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
37. I need to know what criteria must be met by my institution to be eligible for participation in federal and state programs.							
38. I need to know how financial aid office records interface with fiscal office records.							
39. I need to know how to distinguish anticipated loan collections relendable from those collected too late to relend.							
40. I need to know the theory and methodology of need analysis.							
41. I need to know the management cycle of the financial aid office.							
42. I need to know the legal implications of student informational exchange between institutions and agencies.							
43. I need to know how to focus on student responsibility as well as student rights under financial aid programs.							
Note: Please add items of your own below:							
44.							
45.							
46.							
47.							
48.							
49.							
50.							

COUNSELLORS

Training Needs Survey

By participating in this training needs survey, you can help plan a program of training services to help you meet your identified needs.

As you respond to each item, please think of how previous training programs have provided information necessary for your work, and what your present need is for additional information.

Directions:

1. Read each need statement carefully and respond, by checking the appropriate box, first to the extent to which training programs you have attended in Arizona and elsewhere have met your informational needs; then indicate your present need for more training on each subject by checking the appropriate box.

2. At the end of the list, please add any subject you feel are important, and indicate the extent of your need for more training on those subjects.

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
Example: A. I need to know what BEOG is:	☒			☒			

(Note: This response shows that prior training programs met information needs well, and that there is no present need for more training.)

B. I need to know about the new SSIG program in Arizona:			☒			☒	

(Note: This response shows that prior training programs met information not at all, and that there is a moderate need for training at the present time.)

Please proceed to the remaining items:

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
1. I need to know more about Nursing or Health Profession Scholarships.							
2. I need to know more about Basic Educational Opportunity Grants.							
3. I need to know more about Social Security for postsecondary education.							
4. I need to know more about the Arizona Commission for Postsecondary Education student assistance programs.							
5. I need to know more about Supplemental Grants.							

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
6. I need to know what obligations a student has to repay his Basic Grant if he terminates his academic program.							
7. I need to know what conditions must be met for the renewal of financial aid each year.							
8. I need to know how a student can qualify for a deferment of principal and interest on a NDSL.							
9. I need to know more about the College Work-Study Program.							
10. I need to know more about Vocational Rehabilitation Grants.							
11. I need to know more about National Direct Student Loans.							
12. I need to know more about Federally Insured Student Loans.							
13. I need to know more about Law Enforcement Education Programs.							
14. I need information about student-consumer protection.							
15. I need to know more about Veterans Administration benefits for postsecondary education.							
16. I need to have input in policy-making decisions relative to financial aid.							
17. I need more coordination with the aid office in the collection of loans.							
18. I need cooperation from the aid office in preparing reports.							
19. I need to know the disbursement regulations for the federal programs.							
20. I need to know how the student financial aid budget is built.							
21. I need to know how federal programs can be better related to the total financial structure.							

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
22. I need to know more about matching funds for federal programs.							
23. I need to know how to better expedite disbursement of student aid funds.							
24. I need to know the role of the financial aid administrator.							
25. I need an explicit definition of the role of the fiscal officer in student aid.							
26. I need assistance in preparing internal and external reports.							
27. I need to know how to develop a system whereby my office will be notified when a student receiving aid withdraws or drops courses.							
28. I need to know how to control expenditures within approved levels of operation.							
29. I need to know information on auditing procedures for the various financial aid programs.							
30. I need to know how to reduce the number of defaults on student loans, and steps to take with students who default.							
31. I need to know how to develop better guidelines pertaining to student obligations for educational loan repayments.							
32. I need to know my role in providing information about financial aid.							
33. I need to know my responsibilities for student loan collections.							
34. I need to know the procedure for detecting and referring fraud cases to the Department of Health, Education, and Welfare.							
35. I need alternatives for improving the collection rate for NDSL at my institution.							
36. I need to know if and how funds can be transferred from one federal program to another.							

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
37. I need to know what criteria must be met by my institution to be eligible for participation in federal and state programs.							
38. I need to know how financial aid office records interface with fiscal office records.							
39. I need to know how to distinguish anticipated loan collections relendable from those collected too late to relend.							
40. I need to know the theory and methodology of need analysis.							
41. I need to know the management cycle of the financial aid office.							
42. I need to know the legal implications of student informational exchange between institutions and agencies.							
43. I need to know how to focus on student responsibility as well as student rights under financial aid programs.							

Note: Please add items of your own below:

44.							
45.							
46.							
47.							
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FISCAL OFFICER

Training Needs Survey

By participating in this training needs survey, you can help plan a program of training services to help you meet your identified needs.

As you respond to each item, please think of how previous training programs have provided information necessary for your work, and what your present need is for additional information.

Directions:

1. Read each need statement carefully and respond, by checking the appropriated box, first to the extent to which training programs you have attended in Arizona and elsewhere have met your informational needs; then indicate your present need for more training on each subject by checking the appropriate box.

2. At the end of the list, please add any subject you feel are important, and indicate the extent of your need for more training on those subjects.

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
Example: A. I need to know what BEOG is:	☒			☒			

(Note: This response shows that prior training programs met information needs well, and that there is no present need for more training.)

B. I need to know about the new SSIG program in Arizona:			☒			☒	

(Note: This response shows the prior training programs met information not at all, and that there is a moderate need for training at the present time.)

Please proceed to the remaining items:

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
1. I need to know more about Nursing or Health Profession Scholarships.							
2. I need to know more about Basic Educational Opportunity Grants.							
3. I need to know more about Social Security for postsecondary education.							
4. I need to know more about the Arizona Commission for Postsecondary Education student assistance programs.							
5. I need to know more about Supplemental Grants.							

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
6. I need to know what obligations a student has to repay his Basic Grant if he terminates his academic program.							
7. I need to know what conditions must be met for the renewal of financial aid each year.							
8. I need to know how a student can qualify for a deferment of principal and interest on a NDSL.							
9. I need to know more about the College Work-Study Program.							
10. I need to know more about Vocational Rehabilitation Grants.							
11. I need to know more about National Direct Student Loans.							
12. I need to know more about Federally Insured Student Loans.							
13. I need to know more about Law Enforcement Education Programs.							
14. I need information about student-consumer protection.							
15. I need to know more about Veterans Administration benefits for postsecondary education.							
16. I need to know where to get information about costs for various postsecondary institutions.							
17. I need to know more about exit interviews.							
18. I need to know how to determine when an institutional aid application is required in addition to a needs analysis form.							
19. I need to know where to find information about monies available to students on a no-need basis.							
20. I need to know when students should apply for financial aid.							
21. I need to know how the Financial Aid Form is used in Arizona.							

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
22. I need to know at what schools in the state students can use Basic Grants.							
23. I need to know how a student can appeal a financial aid decision.							
24. I need to know the legal implications of student informational exchange between institutions and agencies.							
25. I need to know the distinction between providing basic information and counseling.							
26. I need more information about program costs to help students plan for a postsecondary education.							
27. I need to know how part-time jobs other than through the financial aid office affect eligibility for financial aid.							
28. I need to know more about the interrelationship of state and federal programs.							
29. I need to know why student need and awards can differ from institution to institution.							
30. I need to know what criteria must be met in order to be eligible for a State Grant.							
31. I need to know how student budget and family contribution affect student eligibility for aid.							
32. I need to know the procedure for detecting and referring fraud cases to the Department of Health, Education, and Welfare.							
33. I need to know how to do student evaluations on the work-study program.							
34. I need to be informed when students withdraw or drop classes.							
35. I need to know my role in providing information about financial aid.							
36. I need to know about financial aid packaging.							

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
37. I need more time for individual student contact.							
38. I need to know how to interpret an award letter.							
39. I need to know how the family contribution is computed.							
40. I need to know the theory and methodology of need analysis.							
41. I need to know how to identify summer employment opportunities for pre-freshman.							
42. I need to know if aid is transferrable from institution to institution.							
43. I need to know how to focus on student responsibility as well as student rights under financial aid programs.							
44. I need to know how to interpret a Basic Grant Student Eligibility Report.							
45. I need to know how to help people complete an application for funds.							
46. I need to know what financial aid information students need.							
47. I need to know what financial aid information parents need.							
48. I need to know where I can obtain more material to assist students and parents in understanding financial aid.							
49. I need to know how the Financial Aid Form is related to Basic Grant.							
50. I need to know what financial aid programs are available to students who are not eligible for Basic Grant.							
51. I need to know information that will assist me in helping students apply for the Basic Grant.							
52. I need to know what type of educational program qualifies a student for receiving Basic Grant.							

	Prior Training Programs Met Information Need:			Present Need For More Training on This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
53. I need to know how to coordinate counseling and referral functions with aid office operation.							
54. I need to know how high schools can assist financial aid administrators.							
55. I need more information about needs analysis.							
56. I need to know more about how to maintain records efficiently.							
57. I need to know if and when funds are available on a "no need" basis.							
58. I need to know how to help with NDSL collections.							
59. I need to know the minimum income that students need to file.							
60. I need to know about bankruptcy deferment for students unable to repay.							
Note: Please add items of your own below:							
61.							
62.							
63.							
64.							
65.							

Appendix D

ARIZONA COMMISSION FOR POSTSECONDARY EDUCATION

SUITE 115
1650 W. ALAMEDA DRIVE
TEMPE, ARIZONA 35282

TELEPHONE (602) 271-3109

Dear Financial Aid Administrator:

In a letter mailed to you a few weeks ago Dennis Hegle, president of the Arizona Association of Student Financial Aid Administrators alerted you to this study of training needs and requested your participation. The enclosed questionnaires are the principal way we will gather data for that study.

The study is sponsored by the Arizona Commission for Postsecondary Education under the federally-funded State Student Financial Assistance Training Program. The Commission also wishes to gratefully acknowledge the assistance and consultative services of the American College Testing Program.

Goals for this study include a survey of "the present and future training needs of, and staffing requirements for, financial aid practicioners" in Arizona. For this purpose we have developed the enclosed questionnaires. They are designed to be answered quickly and easily. As administrator we are asking you to assist us by not only answering one of the questionnaires, but to distribute appropriate questionnaires to your staff and return them to us in the stamped, self-addressed envelope provided.

Please proceed as follows:

(1) Distribute the green questionnaire to at least one (preferably two) of your office staff who works directly with student applicants and/or the written applications for financial aid. Ask them to please complete it at their earliest opportunity (preferably on the same day you receive this; completion should take no longer than 15 or 20 minutes) and return it directly to you.

(2) Follow the same procedure with the salmon questionnaire for counselors and the yellow questionnaire for fiscal or business officers or staff.

(3) Complete the blue questionnaire designed for you.

(4) Enclose all questionnaires completed or uncompleted in the stamped self-addressed envelope. Please indicate with a note on your questionnaire how many were administered in your office, and how many total persons in your office you have designated as (1) counselors (2) office staff and (3) fiscal or business officers.

Thank you for your assistance! We are confident that our cooperative efforts will result in improvement of training programs.

Sincerely,

Robert H. Fenske

Robert H. Fenske
Project Primary Investigator

RHF/pr

Enclosures

Appendix E

Appendix Table E-1

How Prior Training Programs Met Need For Information About BEOG

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	26	51.0	13	41.9	16	47.1	3	18.8
Partially	20	39.2	15	48.4	15	44.1	7	43.7
Not at all	5	9.8	3	9.7	3	8.8	6	37.5
Total	51	100.0	31	100.0	34	100.0	16	100.0
Present Need For More Training On BEOG								
No Need	23	41.1	4	12.9	14	34.1	2	11.1
Weak Need	12	21.4	7	22.6	7	17.1	5	27.8
Moderate	16	28.6	16	51.6	15	36.6	8	44.4
Strong	5	8.9	4	12.9	5	12.2	3	16.7
Total	56	100.0	31	100.0	41	100.0	18	100.0

Appendix Table E-2

How Prior Training Programs Met Need For Information About NDSL

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	24	48.0	8	27.6	8	23.5	3	18.8
Partially	21	42.0	12	41.4	18	53.0	9	56.2
Not at all	5	10.0	9	31.0	8	23.5	4	25.0
Total	50	100.0	29	100.0	34	100.0	16	100.0
Present Need For More Training On NDSL								
No Need	29	50.9	6	19.4	14	33.3	3	15.8
Weak Need	12	21.1	5	16.1	5	11.9	0	0.0
Moderate	11	19.2	15	48.4	17	40.5	12	63.2
Strong	5	8.8	5	16.1	6	14.3	4	21.0
Total	57	100.0	31	100.0	42	100.0	19	100.0

Appendix Table E-3

How Prior Training Programs Met Need For Information About Repayment of BEOG

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	23	46.0	7	23.3	10	29.4	1	6.3
Partially	21	42.0	14	46.7	21	61.8	9	56.3
Not at all	6	12.0	9	30.0	3	8.8	6	37.4
Total	50	100.0	30	100.0	34	100.0	16	100.0
Present Need For More Training On Repayment of BEOG								
No Need	23	40.4	5	15.6	12	28.7	3	16.7
Weak Need	12	21.1	8	25.0	3	7.1	4	22.2
Moderate	12	21.1	11	34.4	19	45.2	5	27.8
Strong	10	17.4	8	25.0	8	19.0	6	33.3
Total	57	100.0	32	100.0	42	100.0	18	100.0

Appendix Table E-4

How Prior Training Programs Met Need For Information About Renewal of Financial Aid

	Respondent							
Need Met	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	27	52.9	9	31.0	16	45.7	1	6.3
Partially	16	31.4	15	51.7	14	40.0	7	43.7
Not at all	8	15.7	5	17.3	5	14.3	8	50.0
Total	51	100.0	29	100.0	35	100.0	16	100.0
Present Need For More Training On Renewal of Financial Aid								
No Need	26	44.8	8	25.8	11	26.2	1	5.3
Weak Need	16	27.6	8	25.8	9	21.4	4	21.1
Moderate	9	15.5	10	32.3	17	40.5	8	42.1
Strong	7	12.1	5	16.1	5	11.9	6	31.5
Total	58	100.0	31	100.0	42	100.0	19	100.0

Appendix Table E-5

How Prior Training Programs Met Need For Information About Supplemental Grants

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	21	41.2	8	26.7	11	32.4	2	12.4
Partially	19	37.3	15	50.0	18	52.9	7	43.8
Not at all	11	21.5	7	23.3	5	14.7	7	43.8
Total	51	100.0	30	100.0	34	100.0	16	100.0
Present Need For More Training On Supplemental Grants								
No Need	22	39.3	3	9.4	11	26.2	2	10.5
Weak Need	11	19.6	6	18.8	5	11.9	2	10.5
Moderate	17	30.4	18	56.3	17	40.5	9	47.4
Strong	6	10.7	5	15.5	9	21.4	6	31.6
Total	56	100.0	32	100.0	42	100.0	19	100.0

Appendix Table E-6

How Prior Training Programs Met Need For Information About ACPE Student Assistance Programs

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	11	21.6	6	20.0	3	8.8	2	14.3
Partially	22	43.1	15	50.0	10	29.4	2	14.3
Not at all	18	35.3	9	30.0	21	61.8	10	71.4
Total	51	100.0	30	100.0	34	100.0	14	100.0
Present Need For More Training On ACPE Student Assistance Program								
No Need	15	26.8	1	3.0	5	11.9	2	11.1
Weak Need	10	17.9	4	12.1	6	14.3	2	11.1
Moderate	15	26.8	15	45.5	21	50.0	7	38.9
Strong	16	28.5	13	39.4	10	23.8	7	38.9
Total	56	100.0	33	100.0	42	100.0	18	100.0

Appendix Table E-7

How Prior Training Programs Met Need For Information About College Work - Study Programs

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	22	46.8	11	38.0	18	51.4	3	20.0
Partially	14	29.8	9	31.0	10	28.6	4	26.7
Not at all	11	23.4	9	31.0	7	20.0	8	53.3
Total	47	100.0	29	100.0	35	100.0	15	100.0

Present Need For More Training On College Work - Study Programs

	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
No Need	36	64.3	12	38.7	18	46.2	8	42.1
Weak Need	9	16.1	5	16.1	6	15.4	1	5.3
Moderate	7	12.5	10	32.3	11	28.2	7	36.8
Strong	4	7.1	4	12.9	4	10.2	3	15.8
Total	56	100.0	31	100.0	39	100.0	19	100.0

Appendix Table E-8

How Prior Training Programs Met Need For Information About FISL

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	20	39.2	10	34.5	12	34.3	1	6.6
Partially	26	51.0	10	34.5	15	42.9	7	46.7
Not at all	5	9.8	9	31.0	8	22.8	7	46.7
Total	51	100.0	29	100.0	35	100.0	15	100.0
Present Need For More Training On FISL								
No Need	17	29.3	8	25.0	10	24.4	0	0.0
Weak Need	17	29.3	4	12.5	11	26.8	8	44.5
Moderate	17	29.3	15	46.9	16	39.0	4	22.2
Strong	7	12.1	5	15.6	4	9.8	6	33.3
Total	58	100.0	32	100.0	41	100.0	18	100.0

Appendix Table E-9

How Prior Training Programs Met Need For Information About Student Consumer Protection

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	15	29.4	3	10.3	4	11.8	1	6.7
Partially	27	52.9	9	31.0	12	35.3	9	60.0
Not at all	9	17.7	17	58.7	18	52.9	5	33.3
Total	51	100.0	29	100.0	34	100.0	15	100.0
Present Need For More Training On Student Consumer Protection								
No Need	20	34.5	6	19.4	7	17.5	2	11.1
Weak Need	11	19.0	7	22.6	9	22.5	5	27.8
Moderate	17	29.3	10	32.3	17	42.5	6	33.3
Strong	10	17.2	8	25.7	7	17.5	5	27.8
Total	58	100.0	31	100.0	40	100.0	18	100.0

Appendix Table E-10

How Prior Training Programs Met Need For Information About VA Benefits

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	12	23.5	7	24.2	4	11.8	1	6.7
Partially	23	45.1	11	37.9	11	32.4	5	33.3
Not at all	16	31.4	11	37.9	19	55.8	9	60.0
Total	51	100.0	29	100.0	34	100.0	15	100.0
Present Need For More Training On VA Benefits								
No Need	15	25.9	8	25.8	15	37.5	0	0.0
Weak Need	16	27.6	5	16.1	7	17.5	7	38.9
Moderate	18	31.0	8	25.8	11	27.5	5	27.8
Strong	9	15.5	10	32.3	7	17.5	6	33.3
Total	58	100.0	21	100.0	40	100.0	18	100.0

Appendix Table E-11

How Prior Training Programs Met Need For Information About Reporting Fraud to HEW

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	4	8.4	1	3.4	2	6.3	1	6.7
Partially	22	45.8	8	27.6	8	25.0	5	33.3
Not at all	22	45.8	20	69.0	22	68.7	9	60.0
Total	48	100.0	29	100.0	32	100.0	15	100.0
Present Need For More Training On Reporting Fraud to HEW								
No Need	12	21.4	6	18.8	17	41.5	1	5.6
Weak Need	12	21.4	11	34.3	6	14.6	3	16.7
Moderate	17	30.4	9	28.1	10	24.4	8	44.4
Strong	15	26.8	6	18.8	8	19.5	6	33.3
Total	56	100.0	32	100.0	41	100.0	18	100.0

Appendix Table E-12

How Prior Training Programs Met Need For Information About Improving NDSL Collections

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	9	19.1	4	13.8	2	6.5	1	6.7
Partially	16	34.0	6	20.7	8	25.8	8	53.3
Not at all	22	46.9	19	65.5	21	67.7	6	40.0
Total	47	100.0	29	100.0	31	100.0	15	100.0
Present Need For More Training On Improving NDSL Collections								
No Need	21	38.2	10	31.3	20	50.0	1	5.3
Weak Need	9	16.4	12	37.5	6	15.0	4	21.1
Moderate	9	16.4	5	15.6	7	17.5	7	36.8
Strong	16	29.0	5	15.6	7	17.5	7	36.8
Total	55	100.0	32	100.0	40	100.0	19	100.0

Appendix Table E-13

How Prior Training Programs Met Need For Information About Need Analysis

Need Met	Administrator No.	Administrator %	Counselor No.	Counselor %	Office No.	Office %	Fiscal No.	Fiscal %
Well	19	39.6	7	24.1	8	23.5	0	0.0
Partially	21	43.8	13	44.8	15	44.1	6	46.2
Not at all	8	16.6	9	31.1	11	32.4	7	53.8
Total	48	100.0	29	100.0	34	100.0	13	100.0

Present Need For More Training On Need Analysis

	Administrator No.	Administrator %	Counselor No.	Counselor %	Office No.	Office %	Fiscal No.	Fiscal %
No Need	27	48.2	9	29.0	8	19.0	3	17.6
Weak Need	6	10.7	5	16.1	6	14.3	4	23.5
Moderate	14	25.0	11	35.5	17	40.5	6	35.4
Strong	9	16.1	6	19.4	11	26.2	4	23.5
Total	56	100.0	31	100.0	42	100.0	17	100.0

Appendix Table E-14

How Prior Training Programs Met Need For Information About Exchanging Student Information

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	13	26.0	3	10.3	6	18.2	0	0.0
Partially	26	52.0	12	41.4	14	42.4	6	40.0
Not at all	11	22.0	14	48.3	13	39.4	9	60.0
Total	50	100.0	29	100.0	33	100.0	15	100.0

Present Need For More Training On
Exchanging Student Information

Need	Administrator No.	Administrator %	Counselor No.	Counselor %	Office No.	Office %	Fiscal No.	Fiscal %
No Need	17	29.8	4	12.4	6	14.3	1	5.3
Weak Need	9	15.8	8	25.0	12	28.5	2	10.5
Moderate	19	33.3	10	31.3	17	40.5	8	42.1
Strong	12	21.1	10	31.3	7	16.7	8	42.1
Total	57	100.0	32	100.0	42	100.0	19	100.0

Appendix Table E-15

How Prior Training Programs Met Need For Information About Student Rights and Responsibilities

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	14	28.0	6	20.7	8	23.5	0	0.0
Partially	26	52.0	15	51.7	17	50.0	8	57.1
Not at all	10	20.0	8	27.6	9	26.5	6	42.9
Total	50	100.0	29	100.0	34	100.0	14	100.0
Present Need For More Training On Student Rights and Responsibilities								
No Need	12	21.4	4	12.5	8	18.6	3	16.7
Weak Need	18	32.1	6	18.8	8	18.6	7	38.9
Moderate	17	30.4	13	40.6	19	44.2	3	16.7
Strong	9	16.1	9	28.1	8	18.6	5	27.7
Total	56	100.0	32	100.0	43	100.0	18	100.0

Appendix Table E-16

How Prior Training Programs Met Need For Information About Social Security

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	4	8.2	2	6.9	0	0.0	0	0.0
Partially	15	30.6	7	24.1	8	23.5	5	35.7
Not at all	30	61.2	20	69.0	26	76.5	9	64.3
Total	49	100.0	29	100.0	34	100.0	14	100.0
Present Need For More Training On Social Security								
No Need	11	19.0	1	3.0	9	22.0	2	11.1
Weak Need	12	20.7	7	21.2	8	19.5	4	22.2
Moderate	22	37.9	13	39.4	18	43.9	5	27.8
Strong	13	22.4	12	36.4	6	14.6	7	38.9
Total	58	100.0	33	100.0	41	100.0	18	100.0

Appendix Table E-17

How Prior Training Programs Met Need For Information About Law Enforcement Education Programs

	Respondent							
	Administrator		Counselor		Office		Fiscal	
Need Met	No.	%	No.	%	No.	%	No.	%
Well	6	12.5	4	13.8	4	12.5	0	0.0
Partially	10	20.8	9	31.0	8	25.0	5	33.3
Not at all	32	66.7	16	55.2	20	62.5	10	66.7
Total	48	100.0	29	100.0	32	100.0	15	100.0

Present Need For More Training On Law Enforcement Programs

	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
No Need	28	52.8	5	16.1	17	43.6	6	31.6
Weak Need	7	13.2	6	19.4	4	10.3	4	21.1
Moderate	12	22.6	13	41.9	14	35.8	4	21.1
Strong	6	11.4	7	22.6	4	10.3	5	26.2
Total	53	100.0	31	100.0	39	100.0	19	100.0

Appendix Table E-18

How Prior Training Programs Met Need For Information About Nursing/Health Profession Scholarships

	Respondent							
Need Met	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	7	14.3	3	10.7	2	6.7	1	6.7
Partially	16	32.7	8	28.6	8	26.7	2	13.3
Not at all	26	53.0	17	60.7	20	66.6	12	80.0
Total	49	100.0	28	100.0	30	100.0	15	100.0
	Present Need For More Training On Nursing/Health Profession Scholarships							
No Need	31	56.4	5	15.6	13	33.3	7	36.9
Weak Need	10	18.2	4	12.5	11	28.2	2	10.5
Moderate	12	21.8	13	40.6	12	30.8	5	26.3
Strong	2	3.6	10	31.4	3	7.7	5	26.3
Total	55	100.0	32	100.0	39	100.0	19	100.0

Appendix Table E-19

How Prior Training Programs Met Need For Information About Vocational Rehabilitation Grants

Need Met	Respondent							
	Administrator		Counselor		Office		Fiscal	
	No.	%	No.	%	No.	%	No.	%
Well	2	4.0	2	6.9	1	3.0	0	0.0
Partially	11	22.0	11	37.9	5	15.2	7	46.7
Not at all	37	74.0	16	55.2	27	81.8	8	53.3
Total	50	100.0	29	100.0	33	100.0	15	100.0
Present Need For More Training On Vocational Rehabilitation Grants								
No Need	13	22.8	2	6.5	7	18.0	0	0.0
Weak Need	5	3.8	6	19.4	8	20.5	5	27.8
Moderate	21	36.8	11	35.5	16	41.0	6	33.3
Strong	18	31.6	12	38.6	8	20.5	7	38.9
Total	57	100.0	31	100.0	39	100.0	18	100.0

Appendix F

Appendix Table F-1

Responses of Financial Aid Administrators to Training Needs Assessment Questions

Questions	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
1. I need to know more about Supplemental Grants.	21 (41.2)	19 (37.3)	11 (21.6)	21 (39.3)	11 (19.6)	17 (30.4)	6 (10.7)
2. I need to know more about Law Enforcement Education.	6 (12.5)	10 (17.2)	32 (55.2)	28 (52.8)	7 (13.2)	12 (22.6)	6 (11.3)
3. I need to know more about Nursing or Health Profession Scholarships.	7 (14.3)	16 (32.7)	26 (53.1)	31 (56.4)	10 (18.2)	12 (21.8)	2 (3.6)
4. I need to know how to package aid more equitably.	18 (36.0)	23 (46.0)	9 (18.0)	24 (42.9)	10 (17.9)	12 (21.4)	10 (17.9)
5. I need to know more about Basic Educational Opportunity Grants.	26 (51.0)	20 (39.2)	5 (9.8)	23 (41.1)	12 (21.4)	16 (28.6)	5 (8.9)
6. I need to know more about Social Security for postsecondary education.	4 (8.2)	15 (30.6)	30 (61.2)	11 (19.0)	12 (20.7)	22 (37.9)	13 (22.4)
7. I need to know more about the Arizona Commission for Post-secondary Education student assistance programs.	11 (21.6)	22 (43.1)	18 (35.3)	15 (26.8)	10 (17.9)	15 (26.8)	16 (28.6)
8. I need to know what obligations a student has to repay his Basic Grant if he terminates his academic program.	23 (46.0)	21 (42.0)	6 (12.0)	23 (40.4)	12 (21.1)	12 (21.1)	10 (17.5)
9. I need to know what conditions must be met for the renewal of financial aid each year.	27 (52.9)	16 (31.4)	8 (15.7)	26 (44.8)	16 (27.6)	9 (15.5)	7 (12.1)
10. I need to know how a student can qualify for a deferment of principal and interest on a NDSL.	26 (51.0)	15 (29.4)	10 (19.6)	35 (60.3)	10 (17.2)	9 (15.5)	4 (6.9)
11. I need to know more about the College Work-Study Program.	22 (46.8)	14 (29.8)	11 (23.4)	36 (64.3)	9 (16.1)	7 (12.5)	4 (7.1)
12. I need to know more about Vocational Rehabilitation Grants.	2 (4.0)	11 (22.0)	37 (74.0)	13 (22.8)	5 (8.8)	21 (36.8)	18 (31.6)
13. I need to know more about National Direct Student Loans.	24 (48.0)	21 (42.0)	5 (10.0)	29 (50.9)	12 (21.1)	11 (19.3)	5 (8.8)

	Prior Training Programs Met Information Need:			Present Need for More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
14. I need to know more about Federally Insured Student Loans.	20 (39.2)	26 (51.0)	5 (9.8)	17 (29.3)	17 (29.3)	17 (29.3)	7 (12.1)
15. I need information about student-consumer protection.	15 (29.4)	27 (52.9)	9 (17.6)	20 (34.5)	11 (19.0)	17 (29.3)	10 (17.2)
16. I need to know more about Veterans Administration benefits for postsecondary education.	12 (23.5)	23 (45.1)	16 (31.4)	15 (25.9)	16 (27.6)	18 (31.0)	9 (15.5)
17. I need to know how to develop better publications and information materials for students	8 (15.4)	26 (50.0)	18 (34.6)	12 (21.1)	11 (19.3)	18 (31.6)	16 (28.1)
18. I need to know what financial aid data processing techniques are available.	9 (17.6)	24 (47.1)	18 (35.3)	14 (24.6)	14 (24.6)	10 (17.5)	19 (33.3)
19. I need to better understand the relationship between the aid office, business office and admissions.	17 (36.2)	20 (42.6)	10 (21.3)	26 (49.1)	11 (20.8)	10 (18.9)	6 (11.3)
20. I need to receive more timely and effective communication from aid associations such as AASFAA, WASFAA, and NASFAA.	20 (38.5)	23 (44.2)	9 (17.3)	24 (42.9)	15 (26.8)	10 (17.9)	7 (12.5)
21. I need to have assistance in updating and building consistent, equitable student budgets.	18 (36.0)	25 (50.0)	7 (14.0)	22 (39.3)	15 (26.8)	9 (16.1)	10 (17.9)
22. I need to have more control over policy-making in financial aid practices on my campus.	17 (36.2)	15 (31.9)	15 (31.9)	35 (62.5)	6 (10.7)	4 (7.1)	11 (19.6)
23. I need to know how to coordinate counseling and referral functions with aid office operations.	16 (32.7)	21 (42.9)	12 (24.5)	27 (47.4)	13 (22.8)	12 (21.1)	5 (8.8)
24. I need to know more about the inter-relationship of state & federal programs.	14 (28.0)	24 (48.0)	12 (24.0)	17 (29.3)	16 (27.6)	18 (31.0)	7 (12.1)
25. I need assistance in preparing internal and external reports.	15 (30.0)	20 (40.0)	15 (30.0)	24 (41.4)	13 (22.4)	15 (25.9)	6 (10.3)
26. I need to know how to develop a system whereby my office will be notified when a student receiving aid withdraws or drops courses.	17 (35.4)	16 (33.3)	15 (31.3)	21 (38.2)	13 (23.6)	8 (14.5)	13 (23.6)
27. I need to know how to control expenditures within approved levels of operation.	14 (29.8)	17 (36.2)	16 (34.0)	28 (50.9)	8 (14.5)	12 (21.8)	7 (12.7)
28. I need to know information on auditing procedures for the various financial aid programs.	11 (22.9)	25 (52.1)	12 (25.0)	16 (29.6)	9 (16.7)	17 (31.5)	12 (22.2)

	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
29. I need to know how to reduce the number of defaults on student loans, and steps to take with students who default.	11 (23.4)	23 (48.9)	13 (27.7)	20 (36.4)	7 (12.7)	18 (32.7)	10 (18.2)
30. I need to know the procedure for detecting and referring fraud cases to the Department of Health, Education and Welfare.	4 (8.3)	22 (45.8)	22 (45.8)	12 (21.4)	12 (21.4)	17 (30.4)	15 (26.8)
31. I need alternatives for improving the collection rate for NDSL at my institution.	9 (19.1)	16 (34.0)	22 (46.8)	21 (38.2)	9 (16.4)	9 (16.4)	16 (29.1)
32. I need to know if and how funds can be transferred from one federal program to another.	22 (45.8)	13 (27.1)	13 (27.1)	30 (53.6)	12 (21.4)	8 (14.3)	6 (10.7)
33. I need to know what criteria must be met by my institution to be eligible for participation in federal and state programs.	22 (44.9)	14 (28.6)	13 (26.5)	29 (50.9)	11 (19.3)	8 (14.0)	9 (15.8)
34. I need to know how to distinguish anticipated loan collections relendable from those collected too late to relend.	10 (21.3)	8 (17.0)	29 (61.7)	26 (47.3)	9 (16.4)	7 (12.7)	13 (23.6)
35. I need to know more about procedures for internal management of the financial aid office.	15 (30.0)	24 (48.0)	11 (22.0)	18 (31.6)	10 (17.5)	19 (33.3)	10 (17.5)
36. I need to know the theory and methodology of need analysis.	19 (39.6)	21 (43.8)	8 (16.7)	27 (48.2)	6 (10.7)	14 (25.0)	9 (16.1)
37. I need to know the legal implications of exchange of student information between institutions and agencies.	13 (26.0)	26 (52.0)	11 (22.0)	17 (29.8)	9 (15.8)	19 (33.3)	12 (21.1)
38. I need to know how to focus on student responsibility as well as student rights under financial aid programs.	14 (28.0)	26 (52.0)	10 (20.0)	12 (21.4)	18 (32.1)	17 (30.4)	9 (16.1)
39. I need to know how to interpret a Basic Grant Student Eligibility Report.	31 (64.6)	13 (27.1)	4 (8.3)	35 (62.5)	9 (16.1)	10 (17.9)	2 (3.6)
40. I need to know how to help people complete an application for funds.	33 (67.3)	10 (20.4)	6 (12.2)	37 (64.9)	6 (10.5)	8 (14.0)	6 (10.5)
41. I need to know where I can obtain more material to assist students and parents in understanding financial aid.	22 (44.9)	20 (40.8)	7 (14.3)	27 (47.4)	8 (14.0)	16 (28.1)	6 (10.5)
42. I need to know how the Financial Aid Form is related to Basic Grant.	26 (55.3)	14 (29.8)	7 (14.9)	33 (60.0)	8 (14.5)	8 (14.5)	6 (10.9)

	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
43. I need to know what additional financial aid programs are available to students who are eligible for Basic Grant.	31 (63.3)	12 (24.5)	6 (12.2)	31 (56.4)	9 (16.4)	9 (16.4)	6 (10.9)
44. I need to know what type of educational program qualifies a student for receiving Basic Grant.	29 (60.4)	15 (31.3)	4 (8.3)	35 (64.8)	6 (11.1)	11 (20.4)	2 (3.7)
45. I need to know how part-time jobs other than through the financial aid office affect eligibility for financial aid.	21 (42.0)	21 (42.0)	8 (16.0)	24 (42.9)	8 (14.3)	15 (26.8)	9 (16.1)
46. I need more information about educational program costs to help students plan for a postsecondary education.	19 (40.4)	21 (44.7)	7 (14.9)	25 (45.5)	14 (25.5)	10 (18.2)	6 (10.9)
47. I need to know how to make and document adjustments to needs analysis forms.	13 (27.1)	26 (54.2)	9 (18.8)	20 (37.0)	5 (9.3)	18 (33.3)	11 (20.4)
48. I need to know how to determine if I have need for additional staff.	13 (26.0)	15 (30.0)	22 (44.0)	26 (46.4)	10 (17.9)	11 (19.6)	9 (16.1)
49. I need to know how student budget and family contribution affect student eligibility for aid.	23 (46.0)	24 (48.0)	3 (6.0)	26 (47.3)	8 (14.5)	14 (25.5)	7 (12.7)
50. I need to know how to determine awarding priorities for CWSP, SEOG, and NDSL.	21 (43.8)	19 (39.6)	8 (16.7)	28 (50.9)	8 (14.5)	11 (20.0)	8 (14.5)
51. I need to know some guidelines in establishing academic standards for receiving aid.	22 (44.0)	20 (40.0)	8 (16.0)	28 (50.9)	9 (16.4)	10 (18.2)	8 (14.5)
52. I need to know how to develop student expense budgets.	17 (34.7)	26 (53.1)	6 (12.2)	24 (43.6)	9 (16.4)	11 (20.0)	11 (20.0)
53. I need to know how to develop and implement a summer College Work-Study program.	9 (20.0)	16 (35.6)	20 (44.4)	31 (58.5)	7 (13.2)	9 (17.0)	6 (11.3)
54. I need to know how to implement and manage an off-campus College Work-Study Program.	7 (15.6)	14 (31.1)	24 (53.3)	29 (54.7)	8 (15.1)	11 (20.8)	5 (9.4)
55. I need to know how to develop an evaluation system for student performance on the work-study program.	8 (17.4)	16 (34.8)	22 (47.8)	27 (50.0)	5 (9.3)	14 (25.9)	8 (14.8)
56. I need to know how to coordinate institutional programs of aid with outside resources such as CETA, REHABILITATION, etc.	6 (12.2)	19 (38.8)	24 (49.0)	17 (29.8)	7 (12.3)	19 (33.3)	14 (24.6)

	Prior Training Programs Met Information Need.			Present Need for More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
57.I need to know how to develop a student budget when only one parent is involved in the student's support.	17 (35.4)	22 (45.8)	9 (18.8)	28 (50.0)	13 (23.2)	9 (16.1)	6 (10.7)
58.I need to know the financial aid policies of other awarding agencies, such as CETA, and REHABILITATION.	5 (10.4)	15 (31.3)	28 (58.3)	14 (25.0)	7 (12.5)	15 (26.8)	20 (35.7)
59.I need to know about billing and collection agencies.	9 (19.6)	18 (39.1)	19 (41.3)	26 (48.1)	6 (11.1)	14 (25.9)	8 (14.8)
60.I need to know more about job location for CWS,	12 (26.7)	13 (28.9)	20 (44.4)	31 (58.5)	8 (15.1)	9 (17.0)	5 (9.4)
61.I need to know more about policies for fair and equitable refunds.	10 (20.8)	24 (50.0)	14 (29.2)	22 (39.3)	9 (16.1)	18 (32.1)	7 (12.5)
62.I need to know about exit interviews for students on loans.	11 (22.9)	21 (43.8)	16 (33.3)	19 (33.9)	11 (19.6)	18 (32.1)	8 (14.3)
63.I need to know how to implement affirmative action for student employees.	6 (12.8)	16 (34.0)	25 (53.2)	23 (41.8)	8 (14.5)	13 (23.6)	11 (20.0)
64.I need to know more about the new SSIG program in Arizona.	14 (29.2)	16 (33.3)	18 (37.5)	18 (33.3)	8 (14.8)	14 (25.9)	14 (25.9)

NOTE: Four administrators offered optional responses.

Appendix Table F-2

Responses of Counselors To Training Needs Assessment Questions

Questions	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
1. I need to know more about Nursing or Health Profession Scholarships.	3 (10.7)	8 (28.6)	17 (60.7)	5 (15.6)	4 (12.5)	13 (40.6)	10 (31.3)
2. I need to know more about Basic Educational Opportunity Grants.	13 (41.9)	15 (48.4)	3 (9.7)	4 (12.9)	7 (22.6)	16 (51.6)	4 (12.9)
3. I need to know more about Social Security for postsecondary education.	2 (6.9)	7 (24.1)	20 (69.0)	1 (3.0)	7 (21.2)	13 (39.4)	12 (36.4)
4. I need to know more about the Arizona Commission for Postsecondary Education student assistance programs.	6 (20.0)	15 (50.0)	9 (30.0)	1 (3.0)	4 (12.1)	15 (45.5)	13 (39.4)
5. I need to know more about Supplemental Grants.	8 (26.7)	15 (50.0)	7 (23.3)	3 (9.4)	6 (18.8)	18 (56.3)	5 (15.6)
6. I need to know what obligations a student has to repay his Basic Grant if he terminates his academic program.	7 (23.3)	14 (46.7)	9 (30.0)	5 (15.6)	8 (25.0)	11 (34.4)	8 (25.0)
7. I need to know what conditions must be met for the renewal of financial aid each year.	9 (31.0)	15 (51.7)	5 (17.2)	8 (25.8)	8 (25.8)	10 (32.3)	5 (16.1)
8. I need to know how a student can qualify for a deferment of principal and interest on a NDSL.	7 (25.0)	15 (53.6)	6 (21.4)	4 (13.3)	10 (33.3)	13 (43.3)	3 (10.0)
9. I need to know more about the College Work-Study Program.	11 (37.9)	9 (31.0)	9 (31.0)	12 (38.7)	5 (16.1)	10 (32.3)	4 (12.9)
10. I need to know more about Vocational Rehabilitation Grants.	2 (6.9)	11 (37.9)	16 (55.2)	2 (6.5)	6 (19.4)	11 (35.5)	12 (38.7)
11. I need to know more about National Direct Student Loans.	8 (27.6)	12 (41.4)	9 (31.0)	6 (19.4)	5 (16.1;	15 (48.4)	5 (16.1)
12. I need to know more about Federally Insured Student Loans.	10 (34.5)	10 (34.5)	9 (31.0)	8 (25.0)	4 (12.5)	15 (46.9)	5 (15.6)
13. I need to know more about Law Enforcement Education Programs.	4 (13.8)	9 (31.0)	16 (55.2)	5 (16.1)	6 (19.4)	13 (41.9)	7 (22.6)

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	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
14. I need more information about student-consumer protection.	3 (10.3)	9 (31.0)	17 (58.6)	6 (19.4)	7 (22.6)	10 (32.3)	8 (25.8)
15. I need to know more about Veterans Administration benefits for post-secondary education.	7 (24.1)	11 (37.9)	11 (37.9)	8 (25.8)	5 (16.1)	8 (25.8)	10 (32.3)
16. I need to have input in policy-making decisions relative to financial aid.	5 (17.2)	10 (34.5)	14 (48.3)	8 (25.8)	7 (22.6)	7 (22.6)	9 (29.0)
17. I need more coordination with the aid office in the collection of loans.	3 (10.3)	7 (24.1)	19 (65.5)	18 (58.1)	6 (19.4)	5 (16.1)	2 (6.5)
18. I need cooperation from the aid office in preparing reports.	4 (14.3)	6 (21.4)	18 (64.3)	14 (46.7)	4 (13.3)	6 (20.0)	6 (20.0)
19. I need to know the disbursement regulations for the federal programs.	3 (10.7)	8 (28.6)	17 (60.7)	8 (25.8)	5 (16.1)	11 (35.5)	7 (22.6)
20. I need to know how the student financial aid budget is built.	6 (20.7)	13 (44.8)	10 (34.5)	5 (16.1)	5 (16.1)	13 (41.9)	8 (25.8)
21. I need to know how federal programs can be better related to the total financial structure.	6 (20.7)	12 (41.4)	11 (37.9)	5 (16.1)	9 (29.0)	10 (32.3)	7 (22.6)
22. I need to know more about matching funds for federal programs.	4 (13.8)	15 (51.7)	10 (34.5)	4 (12.9)	6 (19.4)	13 (41.9)	8 (25.8)
23. I need to know how to better expedite disbursement of student aid funds.	2 (6.9)	12 (41.4)	15 (51.7)	5 (16.1)	8 (25.8)	13 (41.9)	5 (16.1)
24. I need to know the role of the financial aid administrator.	6 (20.7)	15 (51.7)	8 (2 .6)	6 (19.4)	9 (29.0)	11 (35.5)	5 (16.1)
25. I need an explicit definition of the role of the fiscal officer in student aid.	3 (10.3)	10 (34.5)	16 (55.2)	6 (18.8)	9 (28.1)	11 (34.4)	6 (18.8)
26. I need assistance in preparing internal and external reports.	2 (6.9)	10 (34.5)	17 (58.6)	10 (32.3)	7 (22.6)	5 (16.1)	9 (29.0)
27. I need to know how to develop a system whereby my office will be notified when a student receiving aid withdraws or drops courses.	4 (13.8)	7 (24.1)	18 (62.1)	13 (40.6)	6 (18.8)	3 (9.4)	10 (31.3)

	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
28. I need to know how to control expenditures within approved levels of operation.	5 (17.2)	7 (24.1)	17 (58.6)	9 (28.1)	11 (34.4)	6 (18.8)	6 (18.8)
29. I need to know information on auditing procedures for the various financial aid programs.	3 (10.3)	11 (37.9)	15 (51.7)	5 (16.1)	9 (29.0)	11 (35.5)	6 (19.4)
30. I need to know how to reduce the number of defaults on student loans, and steps to take with students who default.	5 (17.2)	8 (27.6)	16 (55.2)	6 (18.8)	9 (28.1)	8 (25.0)	9 (28.1)
31. I need to know how to develop better guidelines pertaining to student obligations for educational loan repayments.	3 (10.3)	10 (34.5)	16 (55.2)	4 (12.5)	13 (40.6)	10 (31.3)	5 (15.6)
32. I need to know my role in providing information about financial aid.	8 (27.6)	13 (44.8)	8 (27.6)	5 (15.6)	10 (31.3)	9 (28.1)	8 (25.0)
33. I need to know my responsibilities for student loan collections.	5 (17.2)	6 (20.7)	18 (62.1)	9 (28.1)	10 (31.3)	6 (18.8)	7 (21.9)
34. I need to know the procedure for detecting and referring fraud cases to the Department of Health, Education, and Welfare.	1 (3.4)	8 (27.6)	20 (69.0)	6 (18.8)	11 (34.4)	9 (28.1)	6 (18.8)
35. I need alternatives for improving the collection rate for NDSL at my institution.	4 (13.8)	6 (20.7)	19 (65.5)	10 (31.3)	12 (37.5)	5 (15.6)	5 (15.6)
36. I need to know if and how funds can be transferred from one federal program to another.	5 (17.2)	9 (31.0)	15 (51.8)	6 (18.8)	4 (12.5)	13 (40.6)	9 (28.1)
37. I need to know what criteria must be met by my institution to be eligible for participation in federal and state programs.	7 (25.0)	10 (35.7)	11 (39.3)	9 (28.1)	5 (15.6)	12 (37.5)	6 (18.8)
38. I need to know how financial aid office records interface with fiscal office records.	3 (10.3)	9 (31.0)	17 (58.6)	8 (25.0)	5 (15.6)	10 (31.3)	9 (28.1)
39. I need to know how to distinguish anticipated loan collections relendable from those collected too late to relend.	2 (6.9)	8 (27.6)	19 (65.5)	11 (34.4)	10 (31.3)	3 (9.4)	8 (25.0)

	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
40. I need to know the theory and methodology of need analysis.	7 (24.1)	13 (44.8)	9 (31.0)	9 (29.0)	5 (16.1)	11 (35.5)	6 (19.4)
41. I need to know the management cycle of the financial aid office.	5 (17.2)	9 (31.0)	15 (51.7)	9 (28.1)	9 (28.1)	8 (25.0)	6 (18.8)
42. I need to know the legal implications of student informational exchange between institutions and agencies.	3 (10.3)	12 (41.4)	14 (48.3)	4 (12.5)	8 (25.0)	10 (31.3)	10 (31.3)
43. I need to know how to focus on student responsibility as well as student rights under financial aid programs.	6 (20.7)	15 (51.7)	8 (27.6)	4 (12.5)	6 (18.8)	13 (40.6)	9 (28.1)

NOTE: Two counselors offered optional responses.

Appendix Table F-4

Responses of Fiscal Officers to Training Needs Assessment Questions

Questions	Prior Training Programs Met Information Need: Well	Partially	Not At All	Present Need For More Training On This Subject: No Need	Weak Need	Moderate	Strong
1. I need to know more about Nursing or Health Profession Scholarships.	1 (6.7)	2 (13.3)	12 (80.0)	7 (36.8)	2 (10.5)	5 (26.3)	5 (26.3)
2. I need to know more about Basic Educational Opportunity Grants.	3 (18.8)	7 (43.8)	6 (37.5)	2 (11.1)	5 (27.8)	8 (44.4)	3 (16.7)
3. I need to know more about Social Security for postsecondary education.	0 (0.0)	5 (35.7)	9 (64.3)	2 (11.1)	4 (22.2)	5 (27.8)	7 (38.9)
4. I need to know more about the Arizona Commission for Postsecondary Education student assistance programs.	2 (14.3)	2 (14.3)	10 (71.4)	2 (11.1)	2 (11.1)	7 (38.9)	7 (38.9)
5. I need to know more about Supplemental Grants.	2 (12.5)	7 (43.8)	7 (43.8)	2 (10.5)	2 (10.5)	9 (47.4)	6 (31.6)
6. I need to know what obligations a student has to repay his Basic Grant if he terminates his academic program.	1 (6.3)	9 (56.3)	6 (37.5)	3 (16.7)	4 (22.2)	5 (27.8)	6 (33.3)
7. I need to know what conditions must be met for the renewal of financial aid each year.	1 (6.3)	7 (43.8)	8 (50.0)	1 (5.3)	4 (21.1)	8 (42.1)	6 (31.6)
8. I need to know how a student can qualify for a deferment of principal and interest on a NDSL.	5 (31.3)	7 (43.8)	4 (25.0)	6 (31.6)	2 (10.5)	7 (36.8)	4 (21.1)
9. I need to know more about the College Work-Study Program.	3 (20.0)	4 (26.7)	8 (53.3)	8 (42.1)	1 (5.3)	7 (36.8)	3 (15.8)
10. I need to know more about Vocational Rehabilitation Grants.	0 (0.0)	7 (46.7)	8 (53.3)	0 (0.0)	5 (27.8)	6 (33.3)	7 (38.9)
11. I need to know more about National Direct Student Loans.	3 (18.8)	9 (56.3)	4 (25.0)	3 (15.8)	0 (0.0)	12 (63.2)	4 (21.1)
12. I need to know more about Federally Insured Student Loans.	1 (6.7)	7 (46.7)	7 (46.7)	0 (0.0)	8 (44.4)	4 (22.2)	6 (33.3)
13. I need to know more about Law Enforcement Education Programs.	0 (0.0)	5 (33.3)	10 (66.7)	6 (31.6)	4 (21.1)	4 (21.1)	5 (26.3)

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Questions	Prior Training Programs Met Information Need: Well	Partially	Not At All	Present Need For More Training On This Subject: No Need	Weak Need	Moderate	Strong
14. I need information about student-consumer protection.	1 (6.7)	9 (60.0)	5 (33.3)	2 (11.1)	5 (27.8)	6 (33.3)	5 (27.8)
15. I need to know more about Veterans Administration benefits for post-secondary education.	1 (6.7)	5 (33.3)	9 (60.0)	0 (0.0)	7 (38.9)	5 (27.8)	6 (33.3)
16. I need to know where to get information about costs for various postsecondary institutions.	0 (0.0)	4 (26.7)	11 (73.3)	4 (22.2)	4 (22.2)	3 (16.7)	7 (38.9)
17. I need to know more about exit interviews.	1 (6.7)	9 (60.0)	5 (33.3)	4 (22.2)	1 (5.6)	10 (55.6)	3 (16.7)
18. I need to know how to determine when an institutional aid application is required in addition to a needs analysis form.	1 (6.7)	5 (33.3)	9 (60.0)	3 (16.7)	4 (22.2)	4 (22.2)	7 (38.9)
19. I need to know where to find information about monies available to students on a no-need basis.	0 (0.0)	6 (40.0)	9 (60.0)	1 (5.6)	4 (22.2)	5 (27.8)	8 (44.4)
20. I need to know when students should apply for financial aid.	1 (6.7)	8 (53.3)	6 (40.0)	3 (16.7)	7 (38.9)	4 (22.2)	4 (22.2)
21. I need to know how the Financial Aid Form is used in Arizona.	0 (0.0)	5 (33.3)	10 (66.7)	4 (22.2)	5 (27.8)	3 (16.7)	6 (33.3)
22. I need to know at what schools in the state students can use Basic Grants.	0 (0.0)	4 (28.6)	10 (71.4)	5 (27.8)	4 (22.2)	4 (22.2)	5 (27.8)
23. I need to know how a student can appeal a financial aid decision.	0 (0.0)	2 (14.3)	12 (85.7)	3 (16.7)	6 (33.3)	2 (11.1)	7 (38.9)
24. I need to know the legal implications of student informational exchange between institutions and agencies.	0 (0.0)	6 (40.0)	9 (60.0)	1 (5.3)	2 (10.5)	8 (42.1)	8 (42.1)
25. I need to know the distinction between providing basic information and counseling.	2 (14.3)	6 (42.9)	6 (42.9)	3 (16.7)	8 (44.4)	2 (11.1)	5 (27.8)
26. I need more information about program costs to help students plan for a postsecondary education.	0 (0.0)	6 (42.9)	8 (57.1)	4 (22.2)	5 (27.8)	3 (16.7)	6 (33.3)
27. I need to know how part-time jobs other than through the financial aid office affect eligibility for financial aid.	0 (0.0)	8 (57.1)	6 (42.9)	3 (16.7)	2 (11.1)	7 (38.9)	6 (33.3)

Questions	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
28. I need to know more about the interrelationship of state and federal programs.	0 (0.0)	7 (46.7)	8 (53.3)	1 (5.3)	1 (5.3)	10 (52.6)	7 (36.8)
29. I need to know why student need and awards can differ from institution to institution.	0 (0.0)	7 (50.0)	7 (50.0)	2 (11.1)	8 (44.4)	4 (22.2)	4 (22.2)
30. I need to know what criteria must be met in order to be eligible for a State Grant.	0 (0.0)	5 (35.7)	9 (64.3)	0 (0.0)	6 (33.3)	5 (27.8)	7 (38.9)
31. I need to know how student budget and family contribution affect student eligibility for aid.	1 (6.7)	7 (46.7)	7 (46.7)	3 (16.7)	4 (22.2)	8 (44.4)	3 (16.7)
32. I need to know the procedure for detecting and referring fraud cases to the Department of Health, Education, and Welfare.	1 (6.7)	5 (33.3)	9 (60.0)	1 (5.6)	3 (16.7)	8 (44.4)	6 (33.3)
33. I need to know how to do student evaluations on the work-study program.	2 (14.3)	3 (21.4)	9 (64.3)	7 (38.9)	2 (11.1)	4 (22.2)	5 (27.8)
34. I need to be informed when students withdraw or drop classes.	3 (20.0)	6 (40.0)	6 (40.0)	4 (22.2)	2 (11.1)	5 (27.8)	7 (38.9)
35. I need to know my role in providing information about financial aid.	1 (6.3)	11 (68.8)	4 (25.0)	2 (10.5)	5 (26.3)	7 (36.8)	5 (26.3)
36. I need to know about financial aid packaging.	1 (6.7)	7 (46.7)	7 (46.7)	1 (5.6)	6 (33.3)	5 (27.8)	6 (33.3)
37. I need more time for individual student contact.	0 (0.0)	5 (38.5)	8 (61.5)	4 (23.5)	7 (41.2)	3 (17.6)	3 (17.6)
38. I need to know how to interpret an award letter.	2 (15.4)	7 (53.8)	4 (30.8)	5 (29.4)	5 (29.4)	6 (35.3)	1 (5.9)
39. I need to know how the family contribution is computed.	0 (0.0)	6 (50.0)	6 (50.0)	2 (12.5)	3 (18.8)	8 (50.0)	3 (18.8)
40. I need to know the theory and methodology of need analysis.	0 (0.0)	6 (46.2)	7 (53.8)	3 (17.6)	4 (23.5)	6 (35.3)	4 (23.5)
41. I need to know how to identify summer employment opportunities for pre-freshman.	1 (7.1)	4 (28.6)	9 (64.3)	7 (41.2)	5 (29.4)	0 (0.0)	5 (29.4)

Questions	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
42. I need to know if aid is transferrable from institution to institution.	0 (0.0)	6 (42.9)	8 (57.1)	5 (27.8)	6 (33.3)	3 (16.7)	4 (22.2)
43. I need to know how to focus on student responsibility as well as student rights under financial aid programs.	0 (0.0)	8 (57.1)	6 (42.9)	3 (16.7)	7 (38.9)	3 (16.7)	5 (27.8)
44. I need to know how to interpret a Basic Grant Student Eligibility Report.	1 (7.1)	5 (35.7)	8 (57.1)	3 (16.7)	6 (33.3)	5 (27.8)	4 (22.2)
45. I need to know how to help people complete an application for funds.	1 (7.1)	5 (35.7)	8 (57.1)	3 (16.7)	8 (44.4)	3 (16.7)	4 (22.2)
46. I need to know what financial aid information students need.	1 (7.1)	5 (35.7)	8 (57.1)	2 (11.1)	8 (44.4)	4 (22.2)	4 (22.2)
47. I need to know what financial aid information parents need.	1 (7.1)	5 (35.7)	8 (57.1)	3 (16.7)	9 (50.0)	3 (16.7)	3 (16.7)
48. I need to know where I can obtain more material to assist students and parents in understanding financial aid.	0 (0.0)	6 (42.9)	8 (57.1)	5 (27.8)	4 (22.2)	5 (27.8)	4 (22.2)
49. I need to know how the Financial Aid Form is related to Basic Grant.	0 (0.0)	5 (35.7)	9 (64.3)	3 (16.7)	6 (33.3)	4 (22.2)	5 (27.8)
50. I need to know what financial aid programs are available to students who are not eligible for Basic Grants.	0 (0.0)	6 (42.9)	8 (57.1)	2 (11.1)	4 (22.2)	7 (38.9)	5 (27.8)
51. I need to know information that will assist me in helping students apply for the Basic Grant.	0 (0.0)	7 (50.0)	7 (50.0)	4 (22.2)	5 (27.8)	6 (33.3)	3 (16.7)
52. I need to know what type of educational program qualifies a student for receiving Basic Grant.	0 (0.0)	5 (35.7)	9 (64.3)	4 (22.2)	5 (27.8)	5 (27.8)	4 (22.2)
53. I need to know how to coordinate counseling and referral functions with aid office operation.	1 (7.1)	3 (21.4)	10 (71.4)	6 (33.3)	6 (33.3)	3 (16.7)	3 (16.7)
54. I need to know how high schools can assist financial aid administrators.	1 (7.1)	4 (28.6)	9 (64.3)	5 (27.8)	2 (11.1)	6 (33.3)	5 (27.8)

Questions	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
55. I need more information about needs analysis.	1 (7.1)	6 (42.9)	7 (50.0)	3 (17.6)	8 (47.1)	3 (17.6)	3 (17.6)
56. I need to know more about how to maintain records efficiently.	1 (7.1)	9 (64.3)	4 (28.6)	2 (11.1)	5 (27.8)	7 (38.9)	4 (22.2)
57. I need to know if and when funds are available on a "no need" basis.	0 (0.0)	5 (35.7)	9 (64.3)	2 (11.1)	5 (27.8)	5 (27.8)	6 (33.3)
58. I need to know how to help with NDSL collections.	1 (6.7)	8 (53.3)	6 (40.0)	1 (5.3)	4 (21.1)	7 (36.8)	7 (36.8)
59. I need to know the minimum income that students need to file.	1 (7.1)	7 (50.0)	6 (42.9)	3 (16.7)	6 (33.3)	4 (22.2)	5 (27.8)
60. I need to know about bankruptcy deferment for students unable to repay.	1 (7.1)	7 (50.0)	6 (42.9)	3 (16.7)	6 (33.3)	3 (16.7)	6 (33.3)

Appendix Table F-3

Responses of Office Staff to Training
Needs Assessment Questions

Questions	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
1. I need to know more about Nursing or Health Profession Scholarships.	2 (6.7)	8 (26.7)	20 (66.7)	13 (33.3)	11 (28.2)	12 (30.8)	3 (7.7)
2. I need to know more about Basic Educational Opportunity Grants.	13 (47.1)	15 (44.1)	3 (8.8)	4 (34.1)	7 (17.1)	16 (36.6)	4 (12.2)
3. I need to know more about Social Security for postsecondary education.	0 (0.0)	8 (23.5)	26 (76.5)	9 (22.0)	8 (19.5)	18 (43.9)	6 (14.6)
4. I need to know more about the Arizona Commission for Post-secondary Education student assistance programs	3 (8.8)	10 (29.4)	21 (61.8)	5 (11.9)	6 (14.3)	21 (50.0)	10 (23.8)
5. I need to know more about Supplemental Grants.	11 (32.4)	18 (52.9)	5 (14.7)	11 (26.2)	5 (11.9)	17 (40.5)	9 (21.4)
6. I need to know what obligations a student has to repay his Basic Grant if he terminates his academic program.	7 (29.4)	14 (61.8)	9 (8.8)	5 (28.6)	3 (7.1)	11 (45.2)	8 (19.0)
7. I need to know what conditions must be met for the renewal of financial aid each year.	16 (45.7)	14 (40.0)	5 (14.3)	11 (26.2)	9 (21.4)	17 (40.5)	5 (11.9)
8. I need to know how a student can qualify for a deferment of principal and interest on a NDSL.	11 (32.4)	12 (35.3)	11 (32.4)	12 (29.3)	10 (24.4)	12 (29.3)	7 (17.1)
9. I need to know more about the College Work-Study Program.	18 (51.4)	10 (28.6)	7 (20.0)	18 (46.2)	6 (15.4)	11 (28.2)	4 (10.3)
10. I need to know more about Vocational Rehabilitation Grants.	1 (3.0)	5 (15.2)	27 (81.8)	7 (17.9)	8 (20.5)	16 (41.0)	8 (20.5)
11. I need to know more about National Direct Student Loans.	8 (23.5)	18 (52.9)	8 (23.5)	14 (33.3)	5 (11.9)	17 (40.5)	6 (14.3)
12. I need to know more about Federally Insured Student Loans.	12 (34.3)	15 (42.9)	8 (22.9)	10 (24.4)	11 (26.8)	16 (39.0)	4 (9.8)
13. I need to know more about Law Enforcement Education Programs.	4 (12.5)	8 (25.0)	20 (62.5)	17 (43.6)	4 (10.3)	14 (35.9)	4 (10.3)
14. I need information about student-consumer protection.	4 (11.8)	12 (35.3)	18 (52.9)	7 (17.5)	9 (22.5)	17 (42.5)	7 (17.5)

Questions	Prior Training Programs Met Information Need: Well	Partially	Not At All	Present Need For More Training On This Subject: No Need	Weak Need	Moderate	Strong
15. I need to know more about Veterans Administration benefits for post-secondary education.	4 (11.8)	11 (32.4)	19 (55.9)	15 (37.5)	7 (17.5)	11 (27.5)	7 (17.5)
16. I need to have imput in policy-making decisions relative to financial aid.	5 (15.2)	8 (24.2)	20 (60.6)	13 (32.5)	10 (25.0)	12 (30.0)	5 (12.5)
17. I need more corrdination with the aid office in the collection of loans.	4 (12.5)	7 (21.9)	21 (65.6)	20 (52.6)	9 (23.7)	6 (15.8)	3 (7.9)
18. I need cooperation from the aid office in preparing reports.	6 (18.8)	7 (21.9)	19 (59.4)	18 (46.2)	5 (12.8)	11 (28.2)	5 (12.8)
19. I need to know the disbursement regulations for the federal programs.	10 (28.6)	12 (34.3)	13 (37.1)	9 (22.0)	9 (22.0)	17 (41.5)	6 (14.6)
20. I need to know how the student financial aid budget is built.	11 (31.4)	15 (42.9)	9 (25.7)	9 (22.0)	8 (19.5)	15 (36.6)	9 (22.0)
21. I need to know how federal programs can be better related to the total financial structure.	5 (14.7)	15 (44.1)	14 (41.2)	11 (26.8)	7 (17.1)	17 (41.5)	6 (14.6)
22. I need to know more about matching funds for federal programs.	8 (22.9)	14 (40.0)	13 (37.1)	9 (22.5)	10 (25.0)	17 (42.5)	4 (10.0)
23. I need to know how to better expedite disbursement of student aid funds.	9 (25.7)	11 (31.4)	15 (42.9)	10 (23.8)	12 (28.6)	11 (26.2)	9 (21.4)
24. I need to know the role of the financial aid administrator.	11 (33.3)	13 (39.4)	9 (27.3)	14 (35.0)	12 (30.0)	9 (22.5)	5 (12.5)
25. I need an explicit definition of the role of the fiscal officer in student aid.	7 (21.2)	13 (39.4)	13 (39.4)	13 (33.3)	11 (28.2)	10 (25.6)	5 (12.8)
26. I need assistance in preparing internal and external reports.	6 (18.2)	9 (27.3)	18 (54.5)	15 (37.5)	11 (27.5)	7 (17.5)	7 (17.5)
27. I need to know how to develop a system whereby my office will be notified when a student receiving aid withdraws or drops courses.	8 (23.5)	8 (23.5)	18 (52.9)	16 (38.1)	6 (14.3)	10 (23.8)	10 (23.8)
28. I need to know how to control expenditures within approved levels of operation.	4 (12.1)	6 (18.2)	23 (69.7)	22 (56.4)	7 (17.9)	5 (12.8)	5 (12.8)
29. I need to know information on auditing procedures for the various financial aid programs.	4 (11.8)	8 (23.5)	22 (64.7)	13 (31.7)	11 (26.8)	10 (24.4)	7 (17.1)

Questions	Prior Training Programs Met Information Need: Well	Partially	Not At All	Present Need For More Training On This Subject: No Need	Weak Need	Moderate	Strong
30. I need to know how to reduce the number of defaults on student loans, and steps to take with students who default.	2 (6.3)	8 (25.0)	22 (68.8)	17 (44.7)	6 (15.8)	8 (21.1)	7 (18.4)
31. I need to know how to develop better guidelines pertaining to student obligations for educational loan repayments.	3 (9.7)	10 (32.3)	18 (58.1)	13 (32.5)	9 (22.5)	14 (35.0)	4 (10.0)
32. I need to know my role in providing information about financial aid.	13 (41.9)	11 (35.5)	7 (22.6)	14 (33.3)	5 (11.9)	15 (35.7)	8 (19.0)
33. I need to know my responsibilities for student loan collections.	3 (9.7)	9 (29.0)	19 (61.3)	19 (47.5)	3 (7.5)	11 (27.5)	7 (17.5)
34. I need to know the procedure for detecting and referring fraud cases to the Department of Health, Education, and Welfare.	2 (6.3)	8 (25.0)	22 (68.8)	17 (41.5)	6 (14.6)	10 (24.4)	8 (19.5)
35. I need alternatives for improving the collection rate for NDSL at my institution.	2 (6.5)	8 (25.8)	21 (67.7)	20 (50.0)	6 (15.0)	7 (17.5)	7 (17.5)
36. I need to know if and how funds can be transferred from one federal program to another.	5 (21.1)	9 (27.3)	17 (51.5)	16 (38.1)	6 (14.3)	12 (28.6)	8 (19.0)
37. I need to know what criteria must be met by my institution to be eligible for participation in federal and state programs.	7 (21.2)	10 (30.3)	16 (48.5)	13 (31.7)	10 (24.4)	12 (29.3)	6 (14.6)
38. I need to know how financial aid office records interface with fiscal office records.	4 (11.8)	10 (29.4)	20 (58.8)	13 (31.0)	9 (21.4)	13 (31.0)	7 (16.7)
39. I need to know how to distinguish anticipated loan collections relendable from those collected too late to relend.	1 (3.2)	1 (3.2)	29 (93.5)	20 (50.0)	8 (20.0)	5 (12.5)	7 (17.5)
40. I need to know the theory and methodology of need analysis.	8 (23.5)	15 (44.1)	11 (32.4)	8 (19.0)	6 (14.3)	17 (40.5)	11 (26.2)
41. I need to know the management cycle of the financial aid office.	12 (37.5)	10 (31.3)	10 (31.3)	19 (45.2)	9 (21.4)	11 (26.2)	3 (7.1)
42. I need to know the legal implications of student informational exchange between institutions and agencies.	6 (18.2)	14 (42.4)	13 (39.4)	6 (14.3)	12 (28.6)	17 (40.5)	7 (16.7)

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Questions	Prior Training Programs Met Information Need:			Present Need For More Training On This Subject:			
	Well	Partially	Not At All	No Need	Weak Need	Moderate	Strong
43. I need to know how to focus on student responsibility as well as student rights under financial aid programs.	8 (23.5)	17 (50.0)	9 (26.5)	8 (18.6)	8 (18.6)	19 (44.2)	8 (18.6)

NOTE: One office staff respondent offered optional needs.